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THE UNIVERSITY OF ALBERTA

THE STATUS OF SUBSTITUTE TEACHERS IN ALBERTA

by



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A THESIS

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The undersigned certify that they have read, and  
recommend to the Faculty of Graduate Studies for acceptance,  
a thesis entitled "The Status of Substitute Teachers in  
Alberta" submitted by Alexander Allan Kozeluk in partial  
fulfilment of the requirements for the degree of Master of  
Education.



## ABSTRACT

The purpose of this study was to examine the status of substitute teachers in Alberta school systems. Examination of the literature indicated that little research had been completed about substitute teaching. This study provides information, that was not available previously, about substitute teachers and substitute teaching in Alberta schools. Data were gathered by means of mailed questionnaires. The three instruments designed for the study were mailed to 78 school systems, 320 substitute teachers, and 220 regular classroom teachers. Data from school systems and data about substitute teachers were analysed primarily in terms of frequency distributions, percentages, and means.

The extent to which substitute teachers were utilized and the demand for substitute-teacher services were determined. School board policies, rules, regulations, operational procedures, and services affecting the substitute-teaching function were examined in detail. Personal, professional, and economic factors about substitute teachers were reported and problems inherent in the substitute-teaching function were examined from the viewpoints of substitute and regular teachers.

Data from school systems indicated that systems differ in the provisions which are made for carrying out the substitute-teaching function. In general, systems showed an absence of handbooks, effective evaluation procedures, and inservice work regarding substitute teaching. An increased concern about substitute-teaching services was evident in large city systems.





Substitute teachers are most often married women with one or more dependents. Although some highly qualified persons do substitute-teacher work, substitute teachers generally are not as well qualified as the regular teaching force. Analysis of variance indicated that substitute teachers in city systems experience a greater degree of difficulty and dissatisfaction with substitute-teacher work than do substitutes in non-city systems. Analysis of variance also showed that substitute teachers at the junior high school level are more dissatisfied with substitute teaching than are substitutes at other levels. Regular classroom teachers indicated concern about deficiencies in communication with substitute teachers and inadequacy of the supply of qualified substitutes at the high school level and for specialized subject matter areas.

The study indicated that substitute teachers are utilized extensively in Alberta school systems and that there is a need for educational administrators to plan, develop, coordinate, and integrate the substitute-teacher function with the function of regular teachers. At present, substitute teaching is an emergency, stop-gap-measure service that has become an institutionalized practice but whose value to the education of children has not been determined.



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## Chapter 1

### INTRODUCTION

The evolution of school systems is characterized by largeness and complexity of the organizational structure: consequently, there is need for careful structuring of the personnel-administration function within these systems. The character of the total school staff determines, to a large extent, the adequacy of the educational program. Therefore, the personnel-administration program of a system should make provision for adequate instructional personnel and it must assure that such personnel are utilized in the most effective way.

This study deals with "substitute teachers," an area of staff personnel administration which is too often neglected in the total personnel-administration function of school systems. The integration of the substitute-teaching function into the total personnel-administration function of a system is of vital importance if the substitute teacher is to make a valuable contribution to the education of children. In line with this, Davis and Nickerson (1968:79) state that "it is neither effective nor efficient to consider substitutes only on an emergency basis" and "as the regular teacher must fit into the total staff concept, so must his temporary replacement who, in his service, must cause as little deviation from achieving the school's goals as possible."

The utilization of "substitute teachers" to replace regular staff members, who are temporarily absent, is a widespread practice



throughout North America. Bear and Carpenter (1961:16) estimated that during the 1960-61 school year 200,000 persons served as substitute teachers in the United States, and approximately 9,000,000 teacher days were taught by substitute teachers. A study by the Canadian Education Association (1966:2) indicated that the practice of employing substitute teachers is widely used in the large urban secondary school systems in Canada, and that such systems employ varying practices regarding the utilization of substitute teachers. Practices regarding the employment of substitute teachers vary among the numerous school divisions, counties, and school districts in Alberta. Documentations of such variations, descriptive statistics about the personal and professional qualities of substitute teachers, the magnitude of substitute teaching as an educational practice on a provincial scale, and problems that may be inherent in such practices should be of particular interest to educational administrators.

### Need for the Study

Statements about substitute teachers made in The School Act, (1955) for Alberta, are primarily concerned with defining "substitute teacher," with non-requirement of contract, and with monetary matters. The School Act, 1970 which repealed The School Act (1955) makes reference to "day to day teachers" and indicates that such teachers may teach without contracts. The phrase "day to day teachers" appears to be synonymous with "substitute teachers." The 1955 Act and especially the 1970 Act suggest that many matters concerning the substitute teacher are left to the discretionary powers of school boards or to collective agreement terms as negotiated between teachers' organizations and school jurisdictions.



The need for substitute teachers to replace regular teachers was implied in Sections 363, 364 and 365 of The School Act (1955), which respectively described leave for medical reasons; road, weather and transportation conditions; and, family affliction or other causes deemed sufficient by the board and affecting the regular classroom teacher. Similar factors are implied in Section 88 of The School Act, 1970. In addition to causes stated in permissive legislation, a number of specific circumstances have been identified, negotiated and written into collective agreements, thereby guaranteeing teachers the right to be absent from classroom duties.

The substitute teacher is an important element in a chain of personnel involved in the process of replacing an absent staff member. When a regular teacher is absent this may directly or indirectly affect the children that normally receive instruction, as well as the function of other teachers, a substitute teacher, resident administrators, and central office personnel. Forcina (1958:Preface) described the way that absences of regular teachers affect the school. He stated that:

In no enterprise is providing for absences of personnel more urgent than in our schools. Unlike the factory or the business office, schools must provide a full program and operate a complete schedule every day regardless of personnel absence. Children cannot be left unsupervised; they cannot be filed away until the return of the regular teacher. The public entrusts the schools with the responsibility of providing continuous guidance and purposeful learning for the pupils every day. Therein lies a pressing problem for the school administration.

Polos (1963:393-94) writes critically about "on-call" substitute-teacher functions as he experienced these in California high schools:

The present method of substitute-teaching procurement is obsolete and costly. No doubt the situation has resulted from abuses on the part of both the teachers and the school systems, but tolerance in allowing it to continue can be definitely charged to complacency, disinterest, and a real lack of knowledge of what is actually taking place in the classroom.







Current administrative practice requires the "pinch hitter" to face new schools, unknown colleagues, strange rules, unfamiliar curriculums, and pupils with whom he is totally unacquainted; he is given little or no time for mental or emotional preparation. The harassed administrator is often so busy trying to keep the hinges on the educational door well oiled that he does not have time to orient the new substitute teacher with the complex school plant, the school rules, or the school program.

In light of Polos' description of substitute teaching there is indeed a need to examine various aspects of "on-call" substitute-teacher utilization in Alberta school systems.

The status and the function of the substitute teacher ought to be examined in order to ensure that adequate information exists upon which sound decisions may be based to minimize the disruption of the educational program, and to utilize the services of the substitute teacher in the most effective way. Hopefully, more adequate information about substitute teachers and about substitute teaching will permit examination of some problems that have hitherto been ignored in Alberta education. For example, what type of personnel ought to replace teachers during temporary absences? Should classrooms be provided with substitutes that "supervise" or "baby sit" the children? Or, should the situation be as Rosenberg (1952:2) suggests:

It is necessary at all times to have in the classroom well-trained, efficient persons, acquainted with the program of the school system, possessing a sound philosophy of education and capable of maintaining the highest kind of professional attitude.

How adequate is the present supply of substitute teachers? In the face of increased training requirements for basic teacher certification will there be available an adequate supply of qualified, specialized and capable substitute teachers in the future? What are the implications for school jurisdictions employing "supernumerary teachers," "teacher aides," or other personnel as substitutes? The



present study is intended to provide an information base that may lead to consideration of these and other related problems.

### Purpose of the Study

Arising from the concerns mentioned in the foregoing section the major purpose of this study was to survey the current status of substitute teachers in Alberta school systems and specifically to perform the following tasks:

1. Compile statistics concerning the extent to which substitute teachers were employed by Alberta school systems during the 1968-69 school year.
2. Examine the nature and extent of school board policies, and policies of such organizations as the Alberta Teachers' Association and the Alberta School Trustees' Association in regard to substitute teacher personnel and services.
3. Compile descriptive statistics about the personal and professional characteristics of the people who substitute teach in Alberta and to examine these in light of similar statistics describing the regular-teaching force in Alberta.
4. Examine the degree to which certain elements of the substitute teacher's role are problematic and the extent to which certain factors hinder or facilitate their functioning.
5. Determine the views that regular classroom teachers hold regarding the purpose, quality and usefulness of the services rendered by substitute teachers.

### Delimitations

The study was confined to Alberta school jurisdictions that had



either (1) 40 or more teachers or (2) a superintendent specifically appointed and employed by or for that jurisdiction. Such delimitations were made in order to reduce the number of systems which had to be contacted and to utilize a reliable source of contact for the initial stage of the study, namely school superintendents or personnel officers of Alberta school systems. In effect, delimiting the study in this way excluded the numerous small independent non-divisional school districts from the study. These small systems were considered to be of little consequence to the study since it was assumed that such systems would resemble the small school units in divisions or counties in respect to substitute teachers and substitute teacher services.

The study included only those school systems that completed and returned the "Questionnaire to School Systems" (Appendix B) that was distributed to superintendents of schools or to personnel officers of school systems. Sample populations of substitute teachers and of regular classroom teachers were drawn only from a selection of the systems that indicated their willingness to cooperate further in the study. Selected systems were asked to supply lists of names and addresses of substitute teachers and of regular teachers.

Information was collected by contacting central office personnel of urban and rural school jurisdictions, substitute teachers, regular classroom teachers, and institutions that were concerned with or about substitute teachers. Neither resident administrators, such as principals or vice-principals, nor students were surveyed, although both were considered to be potential sources of information about substitute teacher services. This delimitation was made in order to narrow the scope of the study to a manageable size. The personnel





surveyed were considered to be the most important personnel through which the status of the substitute teacher in Alberta could be determined.

### Limitations

A limitation of the study was that which arose from the operational definition of "substitute teacher." In Alberta, the distinction between personnel designated as "substitute teacher" or as "temporary teacher" is purely arbitrary. In some systems a person, after substitute teaching ten or more consecutive days in the same position is designated as a "temporary teacher." Such a teacher then has full rights and benefits of a regular teacher such as full pay, pension benefits and full voting membership in the Alberta Teachers' Association. Tenure is generally not granted to temporary teachers. In other systems the benefits mentioned above are not forthcoming until forty or more days of substitute teaching service have been consecutively rendered in the same position. Frequently no distinction was made between "substitute" and "temporary" teacher, and in some systems temporary personnel were considered as substitute teachers for pay and other purposes.

### Overview of the Thesis

This chapter has indicated the need for and the purposes of the present study. Chapter 2 reviews briefly the related literature and includes a clarification of terms used in the study.

Chapter 3 describes the instrumentation and data collection procedures used for the study. A description of the sources of data and the nature and size of sample used is also included.





Chapter 4 describes substitute teacher services used in Alberta and the extent and nature of policies about substitute teachers and substitute teaching that exist in school systems. This chapter is based on data collected through the "Questionnaire to School Systems" (Appendix B).

Chapter 5 reports analysis of data concerning the personal, professional and other characteristics of substitute teachers, and the nature and extent of the functions performed by such personnel. Comparisons are made, on a number of variables, between the characteristics of substitute teachers and the characteristics of the regular classroom teachers in Alberta.

Chapter 6 reports the nature and degree of problems experienced by substitute teachers in carrying out their functions. This chapter also reports data obtained from regular teachers concerning the extent to which they find certain aspects of the substitute-teacher function satisfactory or unsatisfactory.

Chapter 7 states conclusions arising from the study and provides suggestions for further study.



## Chapter 2

### REVIEW OF THE LITERATURE AND CLARIFICATION OF TERMS

This chapter examines the literature about substitute teachers and substitute teaching. A brief synopsis of some previous studies that have been completed on the topic of substitute teaching is included. The chapter also deals with definition and clarification of terms as these are used in the study.

Previous studies have been primarily conducted in the United States. Often the legal and organizational structures of the educational systems differed from those in Alberta. A second factor that should be noted is that the latest of such studies is over 15 years old, while earlier studies date back to over 40 years ago. Finally, it should be noted that the studies were confined exclusively to urban school systems.

#### Studies Conducted in Canada

There is an absence of literature about substitute teaching in Canadian school systems. This lack of literature seems to indicate that school systems, educational associations and other institutions either have satisfactory methods of handling the substitute teaching function, or that the whole area of substitute teaching has been considered of little importance.

A search of reports of "Education Studies Completed in Canadian Universities" as compiled by the Canadian Education Association (1955-68), "Canadian Graduate Theses in the Humanities and Social



Sciences 1921-46" issued by the King's Printer (1951) and, "A Classification of Theses in Education Completed at the University of Alberta, 1929-1966" edited by W.D. Knill and others (1967), indicated an absence of studies about substitute teaching in Canadian school systems.

A study conducted by the Canadian Education Association (1966) seems to be the only Canadian study about substitute teaching. This survey of 37 of Canada's larger urban school systems determined what practices were used by each system for substitute teachers in secondary schools. Central office administrative personnel provided "yes" or "no" and other brief responses to each of ten questions asked. Results were reported in a one-page summary for each question asked, and indicated in general that (1) although some differences in practices existed, a good deal of uniformity of practices was evident in urban Canadian school systems with respect to substitute teacher practices at the secondary school level, and (2) substitute teaching is primarily considered on an emergency basis rather than as an integral aspect of the total teaching force.

#### Studies Conducted in the United States

At the conclusion of the review of literature in his study, Lambert (1955) stated that:

All in all, the literature on substitute teachers and substitute teacher services is severely limited. There is probably as little available on this topic as on any topic in public education.

Nevertheless, the literature does indicate that a number of studies have been completed and that such studies have focused on substitute teaching in urban centers. Further, they show that substitute teaching is an important but much neglected, little studied





and often poorly understood area of the total personnel development function of school systems.

Interest and concern about substitute teacher services in urban United States school systems is indicated by the number of doctoral dissertations completed on the subject. For example, the earliest studies were completed by Conners (1927) and Baldwin (1934). Approximately twenty years later studies were completed by Rosenberg (1952) and Turner (1952).

In 1958 Forcina completed a doctoral dissertation which described a "cooperative" or "inservice" project. The purpose of the project was to improve substitute-teacher services in the Trenton, New Jersey school system. The project involved all school personnel (central office administration, principals, substitute teachers, regular teachers, and children) through talks, inservice meetings, discussions and questionnaires. The project was conducted over a two-year period.

As a result of his study Forcina (1958:134-36) made "several conclusions relative to less apparent outcomes of the study." Two of these are specifically relevant to substitute teaching:

1. The study has emphasized that substitute teaching service is a vital part of the teaching-learning program in the schools. Many substitutes spend many days teaching many children. Accordingly, the service demands more than the casual attention often directed to it. As a result of the study, the Trenton schools are now beginning to appreciate more fully the importance of this service in the total educational program.

2. The quality of substitute teaching service depends almost entirely upon the understanding and concern given to it by all the personnel directly involved: central administration, principals, substitute teachers, regular teachers, and children, and upon their conscious effort to make it good. The present study has clearly indicated that as interest among participants grows and as responsibilities are defined and discharged, not only are personal satisfactions apparent, but also improvement in the job is very much in evidence.





A study by Lambert (1955) is reported by the National Education Association (1955):

This research makes two significant contributions to our limited knowledge of substitute teachers and substitute teaching service. The report may well be viewed as the first major benchmark in this largely unexplored field of educational endeavor.

Lambert's study gives a detailed picture of the status of day-to-day substitute teachers in public-school systems of various sizes in the United States. It also points out ways in which regular school personnel can help to make the substitute's work more effective.

Substitute teachers and substitute-teacher services are discussed in books by Perkins and Becker (1966:9-33) and Davis and Nickerson (1968:79-93). Topics such as recruitment, selection, orientation, assignment and evaluation of substitute teachers are discussed. Both texts imply that principles used in administering regular staff ought to apply to substitute teachers.

The literature indicates that there are widespread differences in the practices employed to accommodate classes of children when the regular teacher is absent. These differences are a result of many factors, the more important being system size and geographic features of the system, educational philosophy endorsed by the system, and the importance attached, by administrators at various levels, to providing continuous and uninterrupted instruction to children when the regular teacher is temporarily absent.

#### CLARIFICATION OF TERMS

Substitute Teacher. This term refers to teachers generally known as "on-call," "day-to-day," or "per diem" teachers; in other words, teachers who work only part-time filling in for regular teachers



when they have to be away for health, personal or professional reasons. Such personnel work only a day, a few days, or a few weeks at a time and are assigned and paid on a day-to-day basis.

The term refers to any persons who are called from outside of the school and who function as a substitute teacher even though such persons may not hold any Alberta Teaching Certificate. The term "substitute" will be used interchangeably with the term "substitute teacher."

Regular Classroom Teacher. This term refers to a teacher employed on a full-time basis and who conducts classes on a regular basis throughout a school term.

Large Cities. This term refers to cities that have a total population of over 100,000 people. In Alberta this refers to Edmonton and Calgary.

Small Cities. This term refers to cities that have a total population of less than 100,000 people. There are six such centers in Alberta.

Non-City Systems. This term refers to Alberta Counties, School Divisions, and Independent School Districts not located in cities.

## SUMMARY OF CHAPTER 2

Relative to most topics about personnel in education, substitute teaching is a much neglected area of study. A search of the literature yielded a brief study about substitute-teacher practices in urban Canadian secondary schools and six doctoral dissertations completed in the United States. Of the doctoral dissertations, the most recent were completed by Forcina (1958) who reported on a two-year cooperative-type



project conducted to improve substitute services in a city school system and Lambert (1955) who conducted an extensive questionnaire survey and reported on the status and working relationships of substitute teachers in urban school systems.

Clarification and explanation of terms used throughout the thesis are included in Chapter 2.



## Chapter 3

### METHODOLOGY AND RESEARCH DESIGN

This chapter presents a description of the sources of data and of the populations from which data have been collected. The size and nature of the sample, questionnaire construction, and the distribution of the questionnaires are described. The collection and percentage returns of each type of questionnaire are reported and a brief overview of the statistical analysis of the data is presented.

#### SOURCES OF DATA

Most of the data for this study were obtained through mailed questionnaires completed by (1) Alberta superintendents of schools, personnel officers or other central office personnel designated by the superintendent, (2) a sample of substitute teachers, and (3) a sample of regular classroom teachers. Some data were obtained from the Alberta Teachers' Association (ATA) and the Alberta School Trustees' Association (ASTA).

#### Data from School Systems

Data from school systems were obtained through the "Questionnaire to School Systems," which was mailed to superintendents of school divisions, counties, and school districts that were large enough to have locally appointed superintendents. Names and addresses of superintendents and of systems were taken from a list issued by the Alberta Department of Education on August 27, 1969.





Early in February, 1970, E.K. Hawkesworth, Director of Field Services of the Alberta Department of Education, gave his approval of the study, and subsequently, on February 18, 1970 distributed a letter (Appendix A<sub>1</sub>) to all Alberta Superintendents of Schools to encourage them and their systems to cooperate in the study.

On March 3, 1970 a letter (Appendix A<sub>2</sub>) and the "Questionnaire to School Systems" (Appendix B) were mailed to 78 Alberta counties, divisions and school districts. The stated deadline for return of these questionnaires was March 20, 1970. On March 24, 1970 a reminder letter (Appendix A<sub>3</sub>) was sent to 20 systems that had not returned the questionnaire. Of the 78 questionnaires sent to school systems 86 percent were completed and returned. Eleven systems failed to return a completed questionnaire. Four questionnaires were returned from non-city systems and respondents indicated that the information requested was not available, or that lack of time prevented completion of the questionnaire or that a study about substitute teachers was irrelevant to their system. The distribution and percentage returns of the "Questionnaire to School Systems" are tabulated in Table 1.

At the conclusion of the "Questionnaire to School Systems" respondents were asked to answer "yes" or "no" concerning willingness to participate further in the study, if requested to do so, by supplying names and addresses. Names and addresses of substitute and regular-teacher personnel were obtained from a selection of those systems that replied "yes" to the question of further participation. Of the systems that returned completed questionnaires 46 (85 percent) of non-city systems, 8 (89 percent) of systems in small cities and 4 (100 percent) of systems in large cities consented to supply names and addresses.



Table 1

NUMBER AND PERCENTAGE OF DISTRIBUTION AND RETURN OF QUESTIONNAIRES TO  
SCHOOL SYSTEMS AND OF "YES" RESPONSES TO FURTHER PARTICIPATION

Location of Systems	Questionnaires Mailed	Questionnaires Completed and Returned		"Yes" Responses to Further Participation	
	N	N	%	N	%
Non-City Systems	64	54	84	46	85
Systems in Small Cities	10	9	90	8	89
Systems in Large Cities	4	4	100	4	100
Totals	78	67	86	58	87



A breakdown of responses to the question regarding further participation in the study is given in Table 1.

Lists of names and addresses were requested from 13 non-city systems, six small-city systems and four large-city systems. Table 2 indicates the number of systems from which names and addresses were requested.

Data from school systems obtained through the "Questionnaire to School Systems" were primarily to determine the extent and nature of usage of substitute teacher services, the services that systems provide to substitute teachers, and the nature and extent of rules, regulations, policies or operational procedures that school boards have adopted with respect to substitute teaching.

#### Data from Substitute Teachers

Data from substitute teachers were obtained by mailing 320 unidentified questionnaires (Appendix C) during April, 1970. Nearly equal numbers of these questionnaires were sent to substitute teachers in rural systems, in systems located in small cities, and in systems in large cities. Distribution and percentage returns of the "Questionnaire to Substitute Teachers" are tabulated in Table 2.

Data obtained through the "Questionnaire to Substitute Teachers" were to allow description of the personal and professional qualities of substitute teachers, to determine certain factors about the nature and extent of the functions carried out by substitutes, and to determine the extent to which certain factors associated with their function were problematic.



Table 2  
NUMBER OF QUESTIONNAIRES DISTRIBUTED AND  
RETURNED BY SUBSTITUTE TEACHERS

Location of Systems	Systems From Which Names and Addresses Were Requested	Systems to Which Substitute Questionnaires Were Distributed	Questionnaires Distributed and Returned		
			Total Mailed	Usable Returns	
	N	N	N	N	%
Non-City Systems	13	12	100	75	75
Systems in Small Cities	6	6	100	62	62
Systems in Large Cities	4	4	120	78	65
Totals	23	22 <sup>*</sup>	320	215	67 <sup>**</sup>

\*One system sent its lists of names and addresses too late to be used in the study.

\*\*This figure represents usable returns. Of all questionnaires mailed to substitute teachers 235 or 73 percent were returned.





### Data from Regular Classroom Teachers

Data from regular classroom teachers were obtained by mailing 220 unidentified questionnaires (Appendix D) during April, 1970. Seventy questionnaires were mailed to teachers in each of rural and small-city systems and 80 questionnaires were mailed to teachers in large cities. Distribution and percentage returns of the "Questionnaire to Regular Classroom Teachers" are tabulated in Table 3.

The primary purpose of the data obtained through the "Questionnaire to Regular Classroom Teachers" was to allow the researcher to determine the extent to which regular teachers find certain aspects of the substitute-teacher function problematic.

### Other Sources of Data

Some data were obtained through personal interviews with personnel at head offices of the ATA and the ASTA, and from mimeographed and other materials these associations had compiled regarding certain aspects of substitute teaching.

## INSTRUMENTATION

A decision was made at the outset of the study to conduct a questionnaire survey. Kornhauser (1964:546) provided useful guidelines for construction of the questionnaires used in the present study. He states that the process of questionnaire construction involves six steps:

. . . deciding what information should be sought, deciding what type of questionnaire should be used, writing a first draft, re-examining and revising questions, pretesting, editing the questionnaire, and specifying procedures for its use.

Norton (1930:6) and Whipple (1928:249-59) suggest the following evaluative criteria to be used when formulating a questionnaire:



Table 3  
NUMBER OF QUESTIONNAIRES DISTRIBUTED AND RETURNED  
BY REGULAR CLASSROOM TEACHERS

Location of Systems	Systems from Which Names and Addresses Were Requested	Systems to Which Regular-Teacher Questionnaires Were Distributed	Questionnaires Distributed and Returned		
			Total Mailed	Usable Returns	
	N	N	N	N	%
Non-City Systems	13	12	70	41	60
Systems in Small Cities	6	6	70	44	63
Systems in Large Cities	4	4	80	40	50
Totals	23	22*	220	125	57**

\*One system sent its lists of names and addresses too late to be used in the study.

\*\*This figure represents usable returns. Of all questionnaires mailed to regular teachers 140 or 64 percent were returned.



adequate sponsorship, clear and frank statement of its purpose, worthiness of the educational topic, organization, clear wording, brevity of required responses and minimal time requirement, proper mechanical form, non-availability of information from other sources and related factors. The processes used for construction of questionnaires for the present study paralleled those outlined by Kornhauser and careful attention was given to the evaluative criteria indicated by Norton and by Whipple.

Three questionnaires were designed for purposes of this study (Appendices B,C,D). All questionnaires were designed primarily upon the principle of individual response. All responses could be indicated numerically or by checking or circling the appropriate answer. Each questionnaire concluded with a statement encouraging respondents to make additional comments in a "free response" space provided at the end of each questionnaire. A brief description of factors involved in the construction of each questionnaire follows.

#### Questionnaire to School Systems

The "Questionnaire to School Systems" (Appendix B) was designed to obtain data from school systems as indicated on page 18. Questions included were derived partly from the literature but primarily from the experience background of the researcher. Lambert's study (1955) was most useful in suggesting a structure around which the questionnaire could be constructed. A basic feature of the questionnaire was that the majority of responses could be given simply by checking "yes" or "no" or by making a numerical entry. Short-answer response questions were used primarily to encourage school superintendents or other respondents to complete the questionnaire because of minimal time required, and secondarily to facilitate analysis of the responses.



### Questionnaire to Substitute Teachers

The "Questionnaire to Substitute Teachers" (Appendix C) was designed in two parts. Part I was designed to obtain personal and professional information about substitute teachers and to obtain specific information about substitute teaching. The main purpose of Part I of this questionnaire was to collect data about substitute teachers that would provide statistics which could be compared to similar statistics about the regular teaching force in Alberta.

Part II of the "Questionnaire to Substitute Teachers" consisted of a Likert-type scale which was designed to measure the extent of difficulty or annoyance that substitute teachers experienced with certain potential problem areas. Because the statements used in the scale indicated potential problems, a sixth category of "0" was added to the answer scale thus permitting respondents to indicate that no difficulty was experienced with the particular factor expressed by the statement.

In his study of substitute teaching, Lambert (1955:137-8) asked respondents to list in order the three most serious obstacles to effective substitute work. Twenty-three such obstacles were then ranked in order of frequency mentioned by respondents. A number of the factors indicated in the Lambert study were incorporated directly into the Likert-type scale used in the present study, while other factors were used after slight modifications, and still other factors included in the scale were considered more specifically peculiar to the Alberta school systems. Twenty-five statements were finally selected for the scale and grouped into regular-teacher factors, administrative factors, classroom factors, and other factors.

Pilot study. A pilot study using the "Questionnaire to







Substitute Teachers" was conducted by sending 10 questionnaires to substitutes in an urban system and 10 questionnaires to substitutes in a rural system. A 90 percent return of these pilot questionnaires provided a basis from which a number of additions and modifications were made to the initial questionnaire. The pilot study indicated need for more explicit purposes and directions preceding each section, rewording of some of the statements in Part I to clarify intent, and addition of four items to the scale in Part II as well as the addition of a "0" to the response scale.

#### Questionnaire to Regular Classroom Teachers

The "Questionnaire to Regular Classroom Teachers" (Appendix D) was designed in two parts much the same as the "Questionnaire to Substitute Teachers." Less personal and professional data were requested from regular teachers than from substitutes. An eleven-item Likert-type scale was included in the questionnaire. The purpose of the questionnaire was to gather data from regular classroom teachers regarding their views about the purpose, quality, and usefulness of substitute-teacher services.

Pilot study. A pilot study using the "Questionnaire to Regular Classroom Teachers" was conducted in the same way as with the "Questionnaire to Substitute Teachers." Sixty percent of the 20 pilot questionnaires were completed and returned by the regular teachers. Only minor changes were made to the questionnaire as a result of the pilot study. However, more explicit purposes and directions preceding Part II were deemed necessary, and these were included in the final revision of the questionnaire.



## THE SAMPLE

Data for the present study were obtained from school systems, substitutes, and regular teachers. Because of the large numbers involved in the populations of each group, a decision was made to carry out a sample survey. A description of the samples selected and reasons for the method used to select each sample are indicated below.

### Sample of School Systems

All Alberta school systems that had 40 or more teachers, or those systems that employed a superintendent specifically appointed by or for that system, were included in the study. Using these criteria, the sample included 58 rural counties or divisions, four districts located in large cities, nine districts located in small cities, and seven districts primarily located in towns.

### Sample of Substitute Teachers

Substitute teachers were selected only from those school systems that agreed to participate in the study. Accordingly, all four large city systems, seven small city systems, and thirteen non-city systems were requested to supply names and addresses. One small city system withdrew its offer to cooperate because board policy did not allow the release of names and addresses, one large city system experienced considerable difficulty for the same reason, and one non-city system sent its lists at too late a date to be useful.

The sample of substitute teachers selected for the study was a random selection controlled by the researcher as explained below. School systems were asked to provide a given number of names and



addresses of substitutes from their total list of such personnel. This procedure was used in order that some systems would not have to supply a lengthy list of names and addresses beyond the number that would actually be used in the study. Systems were requested to select "on-call" substitutes that had provided three or more days of substitute service during the current school year. Further, systems were instructed to make a random selection of names and not to select only those that had substituted most, those that were most dependable, or those from one locality, or on the basis of any other such criteria. The letter outlining factors that systems were to observe in making selections of names is included in Appendix A<sub>4</sub>.

Ten systems provided more names than were requested. In such cases a random selection of the required number of names was made by systematically omitting the number of names not required.

Prior to distribution of questionnaires a decision was made to obtain a usable sample of 200 or more questionnaires. Accordingly, a sample of 100 rural substitutes, 100 substitutes from systems in small cities, and 120 substitutes from large city systems were selected from over 400 names supplied by school systems. Thus, 320 unidentified questionnaires were distributed to substitute teachers.

Of the 320 questionnaires mailed to substitutes 215 or 67 percent were returned completed. Seventy-five percent, 62 percent and 65 percent of substitutes from non-city, small city and large city systems respectively, returned completed questionnaires. Percentage returns are tabulated in Table 2 on page 19.

#### Sample of Regular Classroom Teachers

The sample of regular classroom teachers was selected in a





similar way to that used to select the sample of substitute teachers. However, only those teachers that had used the services of on-call substitute teachers for three or more days during the present school year were selected. Further, a decision was made to obtain a usable sample of 100 or more questionnaires. Accordingly, 220 questionnaires were distributed with approximately equal numbers mailed to teachers in each of non-city systems, systems in small cities, and systems in large cities.

Of the 220 questionnaires mailed to regular classroom teachers, 125 or 57 percent were returned completed. Sixty percent, 63 percent, and 50 percent of regular classroom teachers from non-city, small city, and large city systems respectively, returned completed questionnaires. Number and percentage of returns are shown in Table 3 on page 21.

#### OVERVIEW OF THE STATISTICAL ANALYSIS

Data collected for this study were analysed, primarily, to indicate frequencies, percentages, means, and ranges. The Likert-type scale items were analysed in order to indicate number, percent, and means. Items were ranked according to means and according to the number of non-zero responses and according to the number of zero responses. Analyses of variance was performed on the responses to the Likert-type scale items in the questionnaire sent to substitute teachers to test whether a significant difference between means of certain groups was present. Groupings for analysis of variance were made on the basis of school location (three groups) and on the basis of grades taught (four groups). A p value of .1 or less was selected as a suitable level for significance.





## SUMMARY OF CHAPTER 3

Questionnaires to school systems, to substitute teachers, and to regular classroom teachers were designed for this study. The questionnaires to substitute teachers and to regular classroom teachers consisted of a general information section and a section with Likert-type scale items. Both questionnaires were used in pilot studies which suggested changes to the initial instruments.

Data from school systems, substitute teachers, and regular classroom teachers were obtained through questionnaires mailed during March and April, 1970. Questionnaires were distributed to 78 school systems, 320 substitute teachers, and 220 regular classroom teachers. Eighty-six percent of school systems, 73 percent of substitute teachers, and 64 percent of regular classroom teachers returned the questionnaires.



## Chapter 4

### ANALYSIS OF DATA FROM SCHOOL SYSTEMS

An analysis of the data obtained through the "Questionnaire to School Systems" (Appendix B) which was completed by central office personnel of Alberta school systems is reported in this chapter. The extent to which substitute teachers were employed, the demand for and supply of substitute teachers, and methods of recruitment and selection of substitutes are examined. Further, the chapter deals with services provided to substitute teachers by systems, and with rules, regulations, policies or operational procedures systems have adopted respecting substitute teaching.

#### SUBSTITUTE TEACHER USAGE

Sixty-seven school systems reported figures regarding the number of regular classroom teachers and the total number of substitute-teacher days substitute teachers taught during the 1968-69 school year. The results are summarized in Table 4.

#### The Extent to Which Substitute Teachers Are Employed

Compilation of the figures provided by 67 Alberta school systems indicated that during the 1968-69 school year 17,662 regular classroom teachers utilized substitute-teacher services for a total of 84,026 days or an average of 4.76 days per regular classroom teacher.

The 54 non-city systems employed 6,612 regular classroom teachers who required substitute teachers for a total of 28,460 days



or an average of 4.30 days per regular classroom teacher. In the nine systems located in small cities, 1,468 regular classroom teachers required substitute teachers for a total of 6,757 days or an average of 4.60 days per regular teacher. The four systems in large cities indicated that 9,582 regular classroom teachers required substitute teachers for a total of 48,809 days or an average of 5.10 days per teacher.

Teachers in large-city systems required the use of substitute teachers the most, requiring .34 substitute-teacher days more than the mean for all teachers. Teachers in systems located in small cities and in non-city systems required, respectively, the use of substitute teachers for .16 and .46 days less than the mean number of days for all teachers. Teachers located in systems in large cities utilized the services of substitute teachers .5 and .8 days more than teachers in small city and non-city systems respectively.

A number of factors may account for the apparent increase in substitute-teacher services utilized by teachers in systems located in increasingly larger population centers. First, the availability of substitute teachers may be greater in larger centers thereby reducing the number of classrooms that would be covered by other arrangements. A second factor might be that in reporting data the smaller systems could differentiate between "on-call" substitutes and "temporary teachers" more readily, thereby excluding the long-term substitute or temporary teacher and thus lowering the number of substitute-teacher days which appeared to be utilized in the smaller systems. A third factor that may be of some importance in accounting for the greater usage of substitutes in large urban centers is the possibility of a proportionately greater opportunity for inservice and professional



Table 4

REGULAR TEACHER PERSONNEL 1968-69, SUBSTITUTE-TEACHER DAYS IN 1968-69,  
AND MEAN USAGE PER REGULAR TEACHER IN 67 ALBERTA SCHOOL SYSTEMS

Location of Systems	Systems  N	Teachers 1968-69  N	Substitute- Teacher Days 1968-69  N	Mean Days Substitutes Used Per Teacher  N
Non-City Systems	54	6,612	28,460	4.30
Systems in Small Cities	9	1,468	6,757	4.60
Systems in Large Cities	4	9,582	48,809	5.10
Totals	67	17,662	84,026	4.76





development work during school days. And finally, greater usage and/or requirement of substitute teacher services in large centers may be due to an array of general sociological factors attributable to living and working in a large metropolitan urban environment.

#### Mean Number of Days Taught by Substitute Teachers

Table 5 indicates that the mean number of days taught by substitute teachers in Alberta was 32.67. Substitute teachers in non-city systems taught an average of 19.90 days during the 1968-69 school year. In systems located in small cities substitutes taught an average of 32.33 days while in systems located in large cities substitutes averaged 52.32 days of teaching during the 1968-69 school year.

#### NEED FOR AND AVAILABILITY OF SUBSTITUTES

Responses to items 4 and 5 of the "Questionnaire to School Systems" (Appendix B) are summarized in this section.

#### Demand for and/or Concern About Substitute Teaching

Superintendents or other central office personnel of Alberta school systems were asked to indicate whether the demand for substitute teachers and/or their concern about substitute teaching over the past few years had increased, remained the same or decreased. Results are reported in Table 6. Of 67 systems, 39 reported that demand and/or concern had increased, 26 reported that matters had remained about the same, while two systems indicated a decrease in concern.

Percentage of systems indicating that demand and/or concern had increased were not substantially different in non-city systems, systems in small or in large cities. One small city system indicated



Table 5

MEAN NUMBER OF DAYS TAUGHT BY SUBSTITUTE TEACHERS DURING  
1968-69 IN 67 ALBERTA SCHOOL SYSTEMS

Location of Systems	Systems  N	Substitutes Employed in 1968-69  N	Substitute- Teacher Days 1968-69  N	Mean Days Taught by Substitutes  N
Non-City Systems	54	1,430	28,460	19.90
Systems in Small Cities	9	209	6,757	32.33
Systems in Large Cities	4	933	48,809	52.31
Totals	67	2,572	84,026	32.67



a decrease in demand for and/or concern about substitute teaching primarily because of an increased supply of substitutes while one system in a large city indicated a decrease in concern due to a personnel program aimed at improving substitute services. No mention was made by any respondents concerning quality of substitute services. Quantitative or supply factors seemed to be the major concern.

#### Adequacy of Supply of Substitute Teachers

Responses of systems regarding the adequacy of the supply of substitutes according to grade levels are summarized in Table 7. All 13 systems located in cities indicated that an adequate supply of substitutes was available for the elementary grades, while 12 of 54 non-city systems indicated a shortage of elementary substitutes.

A shortage of substitute teachers for secondary grades was indicated by 50 of 54 non-city systems, seven of nine systems in small cities and two of four systems in large cities. All systems indicated shortages of substitutes for special classes such as vocational areas, opportunity classes, advanced high school classes and other similar areas of specialization.

#### Requirement for Substitutes Ranked by Grade Levels

Respondents were asked to rank the grade levels at which substitute teachers were required most frequently. The results, summarized in Table 8, show that the highest frequencies occur on a diagonal joining the upper left and lower right corners for systems in each type of location. This indicates that substitutes are required least frequently by teachers of higher grades and most frequently by teachers of lower grades.



Table 6

DEMAND FOR SUBSTITUTE TEACHERS AND/OR CONCERN ABOUT MATTERS RELATED TO  
 SUBSTITUTE TEACHING OVER PAST FEW YEARS AS REPORTED BY  
 SUPERINTENDENTS OR OTHER CENTRAL OFFICE PERSONNEL

Location of Systems	Systems  N	Demand or Concern Indicated					
		Increased		The Same		Decreased	
		N	%	N	%	N	%
Non-City Systems	54	32	59	22	41	0	-
Systems in Small Cities	9	5	56	3	33	1	11
Systems in Large Cities	4	2	50	1	25	1	25
Totals	67	39	58	26	39	2	3





Table 7

ADEQUACY OF THE SUPPLY OF SUBSTITUTE TEACHERS IN RELATION TO  
DEMAND DURING 1969-70 AS REPORTED BY SUPERINTENDENTS  
OR OTHER CENTRAL OFFICE PERSONNEL

Location of Systems	Grade Levels	Over Supply N	About Enough N	Shortage N
Non-City Systems	Elementary	3	39	12
	Secondary	0	4	50
	Special*	0	2	48
Systems in Small Cities	Elementary	0	9	0
	Secondary	0	2	7
	Special	0	0	9
Systems in Large Cities	Elementary	1	3	0
	Secondary	0	2	2
	Special	0	0	4

\*Special refers to vocational areas, opportunity classes, advanced high school classes and other such areas.



The level at which substitute teachers are most required may be affected by many factors. First, the relative shortage of substitutes at the high school level may make the apparent requirement of substitutes at the higher grade levels less. A second related factor is the greater flexibility in methods of accommodating older students if a regular teacher is absent. For example, independent study by older students and school organization such as "open campus" may lessen the requirement for substitute services. A third factor which may account for more frequent requirement of substitutes at lower grade levels may be that absenteeism of teachers at these levels is actually greater due to age, sex and other factors that differ from teachers at higher grade levels. The greater total absenteeism is also due to the greater number of teachers in lower grades than in higher grades.

## RECRUITMENT AND SELECTION OF SUBSTITUTE TEACHERS

### Recruitment of Substitutes

The primary method of recruiting substitute teachers in Alberta is through inquiries made by interested teachers and by word of mouth. Forty-three non-city systems obtained substitute teachers through inquiries made by interested persons, 26 systems reported that teachers are contacted by word of mouth, and 11 systems indicated they have advertised in newspapers. Newspaper advertisement as a means of recruitment was most often used by non-city systems bordering cities and used to attract such personnel residing in the urban center and within commuting distance of the schools in the bordering system.

Of nine systems in small cities, seven reported recruitment through inquiries, four by word of mouth, four through newspapers, and



Table 8

GRADE LEVELS AT WHICH SUBSTITUTE TEACHERS HAVE BEEN REQUIRED  
MOST FREQUENTLY AS RANKED BY SUPERINTENDENTS OR OTHER  
CENTRAL OFFICE PERSONNEL

Location of Systems	Substitutes Required	Grade Levels			
		1 - 3 f	4 - 6 f	7 - 9 f	10-12 f
Non-City Systems N = 51	Most	22	17	5	7
	Second Most	16	20	13	2
	Third Most	8	6	31	6
	Least	5	8	2	36
Systems in Small Cities N = 9	Most	5	2	0	2
	Second Most	3	3	3	0
	Third Most	1	2	4	2
	Least	0	2	2	5
Systems in Large Cities N = 4	Most	2	0	2	0
	Second Most	1	2	0	1
	Third Most	1	1	2	0
	Least	0	1	0	3



three indicated other methods. Other methods used by systems in small cities and by non-city systems included radio advertising, applications sent to all known teachers in the area, and through principals surveying their communities for available personnel. Three systems in large cities indicated that recruitment was through inquiries and three indicated through word of mouth, while one system indicated that newspaper advertising had been used occasionally. Table 9 summarizes the methods used by Alberta school systems to recruit substitute teachers.

Until the present time the primary means of recruiting regular teacher personnel in Alberta has been by sending personnel officers to university campuses to interview new graduates and through newspaper advertisements. This is in contrast to substitute-teacher recruitment. However, with the supply of regular teachers increasing beyond demand, recruitment of regular teacher personnel appears to be taking the same form that recruitment of substitute teachers has in the past. That is, positions in systems are solicited by interested teachers.

#### Selection of Substitute Teachers

Systems were asked if completion of a written application was required before substitutes were employed. Table 10 contains a summary of responses. "Yes" responses were indicated by 46, 67 and 100 percent respectively by the 54 non-city systems, nine systems in small cities, and four systems in large cities.

A second question in regard to selection was whether an interview of prospective substitute teachers by central office personnel was required prior to employment. "Yes" responses were 28, 22 and 75 percent respectively by non-city, small city and large city systems. Results are indicated in Table 10.





Table 9

METHODS USED IN ALBERTA SCHOOL SYSTEMS  
TO RECRUIT SUBSTITUTE TEACHERS

Location of Systems	Newspaper Advertisements N	By Word of Mouth N	Inquiries by Interested Teachers N	Others* N
Non-City Systems	11	26	43	3
Systems in Small Cities	4	4	7	3
Systems in Large Cities	1	3	3	-

\*Systems indicated that radio advertising has been used, applications sent to all known teachers in the area, and through principals of schools surveying their communities.



Approximately one-half of the 67 systems indicated that written applications are required from prospective substitute teachers. A major purpose of such applications appeared to be to obtain evidence of teacher qualification and/or certification. Interviews, if required, are often casual in nature and conducted by well-experienced but non-professionally trained staff at central office.

#### SPECIAL PROVISIONS AND MEETINGS FOR SUBSTITUTES

##### Provision of a Substitute-Teacher Handbook or Brochure

The provision of a handbook or brochure for substitute teachers should be a necessary requirement of any school system. Its purposes would vary from system to system, but basically it should help orient substitute teachers to numerous general and specific factors about the system, its schools, expectations of the substitute, and other factors which would contribute to the effectiveness of the substitute teacher. The absence of handbooks or brochures in 87 percent of Alberta school systems may well reflect the relative lack of attention that has been given to the area of substitute teaching.

Six percent of the 54 non-city systems, 33 percent of nine systems in small cities, and 75 percent of four systems in large cities indicated that either a substitute-teacher handbook or brochure was provided. Of the three systems in large cities that indicated a substitute-teacher handbook was available two had their handbooks in the "rough draft" or "pending" stage. The few smaller systems indicated that a brochure consisting of a few mimeographed pages was provided. Such brochures may well be adequate in smaller systems where the organizational structure is not as complex and where lines of



Table 10

SYSTEMS REQUIRING WRITTEN APPLICATIONS AND/OR INTERVIEWS  
OF SUBSTITUTE TEACHERS PRIOR TO EMPLOYMENT

Requirement	Systems Insisting on Requirement							
	Non-City (N = 54)		Small City (N = 9)		Large City (N = 4)		Total (N = 67)	
	f	%	f	%	f	%	f	%
Completion of a Written Application Before Employment	25	46	6	67	4	100	35	52
Interview by Central Office Personnel before Employment	15	28	2	22	3	75	20	30



communication are more direct.

#### Distribution of Newsletters and Bulletins to Substitute Teachers

As shown in Table 11, only four of the 67 systems send the same newsletters and bulletins to substitute teachers as are sent to regular teachers. Such materials are usually distributed to schools and substitute teachers have access to these through the schools to which they are assigned.

#### Meetings Regarding Substitute Teaching

Systems were asked to indicate whether special meetings for substitutes were held within the past three years, whether joint meetings of substitutes and regular teachers were held during the past three years, and whether during the past five years a committee had been set up to work on problems of coordinating the services of substitute and regular teachers. Results summarized in Table 12 show that of 67 Alberta systems only 10 percent or fewer replied "yes" to each of the three types of meetings indicated above. Systems in large cities indicated that 50 percent and 75 percent of the four systems had held special meetings or had committees to coordinate services of substitute and regular teachers respectively. These relatively higher percentages of meetings held in large city systems are largely due to such meetings held during the past year and the present (1969-70) school year.

#### FACTORS GOVERNING SUBSTITUTE TEACHER SERVICES

Fourteen rules, regulations, policies or operational procedures were listed in the "Questionnaire to School Systems," (Appendix B).





Table 11

SYSTEMS PROVIDING SUBSTITUTE-TEACHER HANDBOOK OR BROCHURE AND  
DISTRIBUTION OF NEWSLETTERS AND BULLETINS THAT ARE SENT  
TO REGULAR TEACHERS TO SUBSTITUTE TEACHERS

Service	Systems Providing Service							
	Non-City (N = 54)		Small City (N = 9)		Large City (N = 4)		Total (N = 67)	
	f	%	f	%	f	%	f	%
Provision of a Substitute-Teacher Handbook or Brochure	3	6	3	33	3	75	9	13
Distribution of Newsletters and Bulletins to Substitutes	2	4	1	11	1	25	4	6



Table 12

INSERVICE MEETINGS HELD BY SYSTEMS CONCERNING SUBSTITUTE  
TEACHERS AND COORDINATION OF THEIR SERVICES WITH  
THOSE OF REGULAR CLASSROOM TEACHERS

Type of Meeting	Systems Holding Such Meetings							
	Non-City (N = 54)		Small City (N = 9)		Large City (N = 4)		Total (N = 67)	
	f	%	f	%	f	%	f	%
Special Meetings for Substitutes Held within Past Three Years	1	2	0	0	2	50	3	4
Joint Meeting of Substitute and Regular Teachers within Past Three Years	6	11	1	11	0	0	7	10
Committee to Work on Problems of Coordinating Services of Substitute and Regular Teachers within Past Five Years	2	4	1	11	3	75	6	9



Respondents were asked to check "yes" or "no" to indicate if their system had adopted each and to indicate briefly the nature of any factors that were checked "yes." Results are tabulated in Table 13 and each factor is discussed more fully in the sections that follow.

#### Authority for Employing a Substitute Teacher

All city systems and 85 percent of non-city systems have adopted some type of regulation regarding who has the authority to call in a substitute teacher. In non-city systems the authority for calling in substitutes usually rests with the principal, with a few systems permitting the absent teacher to recommend a replacement, and some systems indicating that in cases of long term absences the superintendent assumes responsibility for locating a suitable replacement.

Systems in small cities generally delegate authority for calling in substitutes to principals. However, a fairly common practice is for the absentee teacher to contact the school principal who makes a decision whether a substitute is required, and if so, the principal contacts central office staff who procure the required substitute. This practice permits the principal to decide whether on a particular day the school staff could cover the absence.

Systems in large cities in Alberta delegate the authority and responsibility of the substitute-teacher function to the director of personnel. The authority is usually exercised through personnel assistants and secretaries responsible for contacting and placing substitutes. Teachers telephone the substitute-teacher office direct or through an automatic secretary or recording device. Central office staff dispatch the required substitutes by telephone contact, usually prior to 8:00 a.m.



### Arrangements when Substitute Teachers Are Not Available

All city systems and 56 percent of the non-city systems indicated that regulations regarding arrangements when substitutes are not available are operative in their schools. Some of the more common means of dealing with classes when no substitute teacher is available involve utilization of teachers with preparatory or unassigned periods, combining of classes, supervision of classes by other teachers or by responsible adults, principals or assistants take classes, supernumerary or auxiliary staff take classes, and as a last resort, in some systems, classes are dismissed. If no substitute teacher is available the onus of making suitable arrangements to accommodate the children is on the school principal and his staff.

### Non-certified Personnel Used as Substitutes

Although 57 percent of all systems indicated that they prohibit the use of non-certified personnel, the majority of those that did not have such a regulation indicated that in practice non-certified personnel were never used as substitute teachers. A small number of non-city systems indicated that in cases of emergency or for brief periods of time, teacher aides, secretaries, or any available, responsible adult may be used to supervise classes.

### Professional Qualifications Required of Substitutes

Respondents were asked to indicate whether their systems required professional qualifications of substitutes for purposes other than for salary determination. All respondents that included written clarification indicated that a "teaching certificate" was required. Fifty-two percent of all systems indicated that qualifi-





cations are required of substitute teachers for purposes other than for salary determination.

#### Responsibilities of Principals for Substitute Services

Eighty-eight percent of all respondents indicated that their systems had regulations regarding the responsibilities of principals for substitute services. Most respondents in non-city systems indicated that the major responsibility of the principal was to call or obtain the substitute teacher. Two respondents indicated principals were responsible for orientation of the substitute while two other respondents indicated that principals had the same responsibilities for substitute teachers as for regular teachers.

#### Responsibility of the Regular Teacher to the Substitute

Seventy-five percent of all respondents indicated that their systems had regulations indicating responsibilities of the regular teacher to the substitute teacher. Fifty-five of the systems require regular teachers to provide lesson plans, plan books, log books or some other form of outline to guide the substitute teacher. Presumably such materials would include seating plans, timetables, special duties as well as other information that would be useful to the substitute.

#### Responsibility of the Substitute to the Regular Teacher

Fifty-seven percent of respondents indicated that the primary responsibility of the substitute teacher to the regular teacher involved following lesson plans left by the regular teacher and leaving an account of work completed. One respondent indicated that any regulation concerning the substitute teacher would be difficult to enforce because of their day-to-day status.



### Responsibilities of Substitutes to Students

Thirty-seven percent of respondents indicated that their systems defined the responsibility of the substitute to the students. Responses indicated that insofar as possible the substitute was to "carry on" as the regular teacher and the substitute's responsibilities are those of a regular teacher. Three systems indicated that the substitute was responsible for maintaining discipline in classes and to teach rather than supervise.

### Attendance of Substitutes at Meetings

Substitutes are required to attend meetings held for regular teachers at the system level in 19 percent of systems responding. Generally such attendance is required only if such meetings occur while the substitute is on duty. Remarks indicated that substitutes are invited and encouraged to attend meetings at the system level.

Twenty-five percent of systems require substitutes to attend meetings held at the school level if teaching at the time that such a meeting is held. Generally, substitutes are encouraged to attend staff meetings and other school-level meetings.

### Evaluation of Substitute Teachers

Twenty-seven percent of respondents indicated that their systems require or provide for some method of evaluating substitute-teacher performance. All systems in large cities reported that evaluation of substitutes is the responsibility of the principal. Twenty percent of non-city systems and 33 percent of systems located in small cities indicated that some type of evaluation of substitute teachers was employed. Questionnaire comments indicated that principals generally



evaluate the substitute teacher's work but that much of the evaluation is done informally.

#### Use of Supernumerary Teachers

Seven systems or 10 percent of all systems responding indicated that supernumerary teachers were used for purposes of substitute teaching. Indications from questionnaire comments are that some systems employ "built-in" substitutes whereby teachers are provided with unassigned periods which are to be used for substitute purposes if required. The use of supernumerary teachers, a corps of full-time substitute teachers, floating teachers, or built-in substitutes have apparently not gained wide use or acceptance in Alberta school systems.

#### Pay and Per Teacher Cost of Substitute Services

All 67 systems indicated that they had adopted a scale of pay for substitute teachers. An examination of methods and amounts of pay will be made in Chapter 5.

In an "Analysis of Special Costs" the ASTA (1970) reported on the "Cost of Substitutes Per Teacher." Per teacher costs of substitute services for nine non-city systems that were included in the present study, ranged from \$26.00 to \$147.00 for a one year period. This represents an estimated expenditure of 1.5 percent of the average total cost per teacher per year.

#### Other Factors

Two systems indicated that under some circumstances a travel allowance is paid to substitute teachers. Also, one system indicated that a policy adopted by the board specified the date when substitutes were to be paid.



Table 13

RULES, REGULATIONS, POLICIES OR OPERATIONAL PROCEDURES  
REGARDING SUBSTITUTE TEACHING AS REPORTED  
BY 67 ALBERTA SCHOOL SYSTEMS

Rule, Regulation, Policy or Operational Procedure*	Systems Having Such Provisions			
	Non-City (N = 54)	Small City (N = 9)	Large City (N = 4)	Total (N = 67)
	%	%	%	%
Authority for calling in a substitute teacher	85	100	100	88
Arrangements when no substitute is available	56	100	100	64
Prohibition of non-certified personnel from acting as substitutes	56	56	75	57
Qualifications required for purposes other than salary determination	46	67	100	52
Responsibilities of principals for substitute services	89	100	50	88
Responsibility of regular teacher to the substitute	72	89	75	75
Responsibility of the substitute teacher to the regular teacher	52	67	100	57
Responsibilities of the substitute teacher to the students	30	56	100	37
Substitutes are required to attend system level meetings held for regular teachers	17	22	50	19





Table 13 (Continued)

Rule, Regulation, Policy or Operational Procedure*	Systems Having Such Provisions			
	Non-City (N = 54)	Small City (N = 9)	Large City (N = 4)	Total (N = 67)
	%	%	%	%
Substitutes are required to attend school level meetings held for regular teachers	24	22	50	25
Evaluation of the work of substitute teachers	20	33	100	100
Utilization of permanent supernumerary teachers	7	22	25	10
Salaries to be paid to substitute teachers	100	100	100	100
Others not covered in the questionnaire	4	--	25	5

\*Full statements of rules, regulations, policies or operational procedures are included in the "Questionnaire to School Systems," in Appendix B.



## SUMMARY OF CHAPTER 4

Analysis of data from school systems indicated that during the 1968-69 school year, 17,662 Alberta teachers utilized substitute-teacher services for a total of 84,026 days or an average of 4.76 days per teacher. On the average, substitutes were utilized to a greater extent in the larger urban systems than in smaller systems. Substitutes in large city systems taught a considerable number of days more per school year than substitutes in small-city or non-city systems.

In general, respondents indicated that the demand for substitute teachers and their concern about substitute teaching had increased over the past few years. The utilization and supply of substitutes was greatest at the elementary grade levels and generally showed a decrease with increasing grade level.

Most systems recruit substitute teachers through interested persons asking for substitute work. Approximately one-half of the systems require prospective substitutes to submit written applications, while less than a third of all systems require personal interviews prior to employment.

Few systems provide handbooks and brochures to substitutes, however, indications are that, especially in large city systems, much greater attention is given to this matter at present.

In large city systems substitute services are largely the responsibility of a substitute teacher office, whereas in smaller systems the principal is usually responsible for such services.

A general examination of the extent and nature of rules, regulations, policies and operational procedures adopted by systems



indicated that substitute services differ, and that administration of such services vary from system to system. "On-call" substitute teachers are employed extensively by school systems, but indications are that such personnel are usually not an integral part of the total personnel program. There was little evidence to indicate that many systems were attempting to provide substitute services through methods other than by using "on-call" substitute teachers. A few systems indicated that "built-in" substitutes and "floating teachers" appeared to be providing a satisfactory alternative to calling in substitute teachers from outside of the school.



## Chapter 5

### PERSONAL AND PROFESSIONAL CHARACTERISTICS AND ECONOMIC STATUS OF ALBERTA SUBSTITUTE TEACHERS

Data obtained from Part I of the "Questionnaire to Substitute Teachers" are reported in this chapter. Personal, professional, economic and other related substitute-teacher characteristics are examined and compared, wherever possible, with similar characteristics of the regular teaching force. Statistics about the regular teaching force are taken primarily from "The Alberta Teaching Force, September, 1968" by Wicks and Sillito (1969).

#### PERSONAL CHARACTERISTICS

Sex, marital status, age, number of dependents, and activities on days when not substitute teaching are described in this section.

##### Sex

Data from school systems indicated that 88 percent of substitute teachers are female and 12 percent are male. Males account for five percent of substitutes in non-city systems, 12 percent in small cities, and 23 percent in large cities. A high proportion of the male substitutes in large cities are university students. The random selection of 215 substitute teachers for the present study consisted of 86 percent females and 14 percent males. The proportions of males and of females in the present study approximate the 88 percent females and 12 percent males that made up the 2,345 substitute-teacher population





reported by 67 school systems. The number and percentage of males and females substituting in Alberta as of March, 1970 are reported in Table 14.

Wicks and Sillito (1969:8) report that in September, 1968, 61 percent of the Alberta teaching force were females while 39 percent were males. The high proportion of females (88 percent) and the low proportion of males (12 percent) comprising the Alberta substitute-teacher corps is the result of many factors. First, the part-time nature of substitute teaching lends itself well to women teachers who would find domestic duties and full-time teaching burdensome. Second, the remuneration for substitute teaching is usually not adequate for a male to support a wife and family, but such remuneration may permit a woman to supplement family income appreciably. Low pay and lack of assurance of the amount of employment do not attract males to substitute teaching. Finally, women with one year of teacher training, those whose children are all of school age, and those with various suitable domestic arrangements find substitute teaching adequate to fulfill personal and professional needs.

In the past, teaching has often been thought of as a female occupation. The preponderance of women doing substitute teaching indicates that such work is, at present, usually considered a female role. No doubt there are many reasons why women render substitute-teacher services. Nevertheless, school systems have capitalized on their professional skills to provide a ready and relatively inexpensive source of emergency service.

#### Marital Status

Of the 215 substitute teachers in this study, 8.8 percent were



Table 14

DISTRIBUTION OF SUBSTITUTE TEACHERS BY SEX AS OF  
MARCH, 1970 IN 67 ALBERTA SCHOOL SYSTEMS\*

Location of Systems	Systems  N	Substitute Teachers as of March, 1970				
		Male		Female		Total
		f	%	f	%	
Non-City Systems	54	64	5	1241	95	1305
Systems in Small Cities	9	22	12	160	88	182
Systems in Large Cities	4	194**	23	664	77	858
Totals	67	280	12	2065	88	2345

\*This table summarizes data obtained from the "Questionnaire to School Systems."

\*\*Two large city systems reported that up to one-half of the male substitute teachers were university students.



single, 83.3 percent were married, 7.4 percent were widowed, divorced or separated and .5 percent belonged to religious orders.

A higher percentage of substitute teachers than of regular teachers are married. This greater percentage of married substitutes is related to the predominance of married women who characterize substitute teachers. Marital status data are reported in Table 15.

### Age

This study indicates that 7.4 percent of substitute teachers are 65 years old or older. The modal age category is between 25 and 29 years. The mean age calculated was 39.4 years and the median age was 34.8 years. Wicks and Sillito (1969:4) reported that the median age of Alberta teachers as of January 1, 1969 was 34.6 years.

Comparing percentage frequencies of substitutes in each age category (Table 16) to those about regular teachers as described by Ratsoy (1970:19) indicates that, in respect to age, substitute and regular teachers are similar.

### Dependents of Substitute Teachers

Of 215 substitutes reporting, 141 indicated that they had one or more children who were partially or wholly financially dependent on their parents. The modal number of two children was indicated by 47 respondents, while 32 and 38 substitutes indicated they had one and three children respectively. Two substitutes reported having eight dependent children.

Although 141 substitutes reported having dependent children, 74 indicated they had children that required care (babysitting) while they were substitute teaching. Forty-five reported they had one child



Table 15

CLASSIFICATION OF SUBSTITUTE TEACHERS AND  
REGULAR TEACHERS BY MARITAL STATUS

Marital Status	Substitutes in 1970 (N = 215) %	Regular Teachers in 1968 * (N = 18,872) %
Single	8.8	22.1
Married	83.3	69.8
Widowed, Divorced or Separated	7.4	6.0
Religious Order	.5	2.1

\*These figures are from Wicks and Sillito (1969:6).





Table 16

CUMULATIVE FREQUENCIES AND CUMULATIVE PERCENTAGE  
FREQUENCIES OF SUBSTITUTES BY AGE CATEGORY

Age Category	f	Cumulative Frequency	%	Cumulative Percentage Frequency
70 years or over	3	215	1.4	99.8
65 - 69	13	212	6.0	98.4
60 - 64	13	199	6.0	92.4
55 - 59	11	186	5.1	86.4
50 - 54	16	175	7.4	81.3
45 - 49	14	159	6.5	73.9
40 - 44	18	145	8.4	67.4
35 - 39	22	127	10.2	59.0
30 - 34	37	105	17.2	48.8
25 - 29	42	68	19.5	31.6
20 - 24	26	26	12.1	12.1

Mean Age = 39.4

Median Age = 34.8



requiring care, 25 reported two such children while four substitutes reported three or four such children. The number of dependents of substitutes is reported in Table 17.

#### Activities of Substitutes when Not Teaching

Data reported in Table 18 indicate that 71.6 percent of substitute teachers are involved mainly with domestic duties on days when they are not substitute teaching. Of the remaining 28.4 percent, 5.6 percent are involved in other remunerative activities, 8.8 percent are university students, and 9.8 percent are occupied by leisure-type activities. The 4.2 percent that indicated "other" activities were occupied with charity work, lodge work, or remunerative leisure-type activities.

### PROFESSIONAL CHARACTERISTICS

Training, certification, teaching experience, reasons for substitute teaching, career plans and professional activities of substitute teachers are presented in this section.

#### Teacher Training of Substitute Teachers

Data reported in Table 19 indicate that 36.3 percent of substitutes and 19.1 percent of the regular teaching force have only one year of teacher training. Approximately equal percentages of substitutes and of regular teachers have two or three years of training, whereas 27.4 percent of substitutes and 47.5 percent of the regular teaching force have four or more years of teacher training.

Substitute teachers completed their last year as full-time students in teacher education on an average of 17.45 years ago, and



Table 17

FREQUENCY DISTRIBUTION OF THE NUMBER  
OF DEPENDENTS OF SUBSTITUTES  
(N = 215)

Number of Children	Substitutes Reporting			
	Financially Dependent Children		Children Requiring Care While Substitute Teaching	
	f	%	f	%
8	2	.93	-	-
7	0	-	-	-
6	1	.47	-	-
5	6	2.79	-	-
4	15	6.98	2	.93
3	38	17.67	2	.93
2	47	21.68	25	11.63
1	32	14.80	45	20.93
0	74	34.42	141	65.58



Table 18

ACTIVITIES OF SUBSTITUTES ON SCHOOL DAYS  
WHEN NOT SUBSTITUTE TEACHING  
(N = 215)

Activity	Substitutes Indicating	
	N	%
Domestic duties	154	71.6
Part-time remunerative employment	9	4.2
Full-time remunerative employment	3	1.4
University student	19	8.8
Leisure-type activities	21	9.8
Other	9	4.2





completed a university credit course on an average of 11.39 years ago. Forty percent of substitutes reported that they were either presently involved in completing a university credit course or had done so during the past five years .

One or more university degrees are held by 25.1 percent of substitute teachers as compared to 49.3 percent of regular teachers. The 2.3 percent that reported "other" degrees indicated that they held the equivalent of a degree in education in another country. No degrees were held by 72.6 percent of substitutes which corresponds to the 72.6 percent of substitutes who had one, two or three years of training. Percentages of substitute teachers holding university degrees are reported in Table 20.

#### Certification

Professional certificates are held by 21.9 percent of substitutes and by 48 percent of regular teachers. Most substitute teachers (62.7 percent) hold either some type of standard certificate or a "Junior Elementary" certificate. Letters of authority or no certification was reported by 10.7 percent of substitutes. A comparison of teaching certificates held by substitutes and by regular classroom teachers is reported in Table 21.

#### Teaching Experience

Approximately 50 percent of substitute teachers have five or fewer years of experience as full-time teachers, whereas 40 percent of full-time teachers have five or fewer years of such experience. Thirty percent of the regular teaching force have 15 or more years of teaching experience while approximately 15 percent of substitutes have 15 or



Table 19

YEARS OF TEACHER AND/OR UNIVERSITY TRAINING OF  
SUBSTITUTE TEACHERS AND REGULAR TEACHERS

Years of Teacher Education	Substitutes in 1970 (N = 215) %	Regular Teachers in 1968* (N = 19,068) %
Six or more	3.7	6.1
Five	5.6	10.6
Four	18.1	30.8
Three	10.2	12.0
Two	26.1	21.3
One or less	36.3	19.1

\*These figures are from Wicks and Sillito (1969:13).



Table 20

UNIVERSITY DEGREES HELD BY SUBSTITUTE TEACHERS  
(N = 215)

Degrees Held	Substitutes Reporting	
	f	%
Master's	2	.9
Two Bachelor's	7	3.3
One Bachelor's	45	20.9
No Degree	156	72.6
Other	5	2.3



Table 21

TEACHING CERTIFICATES HELD BY SUBSTITUTES AND  
BY REGULAR CLASSROOM TEACHERS

Certificate Type and Approximate Preparation	Substitutes in 1970 (N = 215) %	Regular Teachers in 1968* (N = 19,079) %
Professional (Three or more years beyond grade 12)	21.9	48.0
Standard (Two years beyond grade 12)	36.7	27.5
Junior Elementary (One year beyond grade 12)	26.0	18.7
Second Class (One year beyond grade 12)	4.7	1.4
Letter of Authority (Usually less than one year beyond grade 12)	9.3	4.3
No Certificate	1.4	-

\*These figures are from Wicks and Sillito (1969:19).





more years of experience.

Full-time teaching positions were held by 66.9 percent of substitutes within the last five years and by 43.7 percent within the past two years. Table 22 summarizes years of teaching experience and years since last full-time position was held.

#### Reason for Substitute Teaching and Career Plans

A total of 39.5 percent of substitute teachers indicated a professional reason, other than remuneration, as their primary reason for substitute teaching. More than one-half (51.6 percent) of substitutes indicated that a primary reason for substituting was monetary. Thirty-five percent indicated that remuneration from substitute teaching was supplementary to other income sources, while 16.7 percent indicated that they substituted to earn income required and essential to provide an adequate standard of living. Most of the 8.8 percent of respondents that indicated "other" reasons for substituting explained that they were awaiting full-time employment. Reasons for doing substitute teaching are reported in Table 23.

Thirty-five percent of substitute teachers plan to return to full-time teaching in the near future, 37.7 percent do not plan to return to full-time teaching, and 27.4 percent are uncertain about future plans. Data reported in Table 24 indicate that those substitutes that replied "yes" or "uncertain" regarding return to full-time teaching were more likely to hold university degrees and to have children requiring care than those that do not plan to return to full-time teaching. Many of the substitutes that may return to full-time teaching are well-qualified women who have interrupted their careers to raise one or more children.



Table 22

NUMBER OF YEARS OF FULL-TIME TEACHING EXPERIENCE OF SUBSTITUTES  
AND OF REGULAR CLASSROOM TEACHERS, AND YEARS SINCE  
SUBSTITUTES HELD LAST FULL-TIME POSITION

Years of Teaching Experience	Substitutes in 1970 (N = 215)	Regular Teachers in 1968* (N = 19,097)	Years Since Substitutes Held a Full-time Position (N = 215)
	%	%	%
15 or more	14.9	30.2	16.7
14	.9	2.3	.5
13	.9	2.3	.5
12	2.3	2.7	-
11	1.8	2.7	1.4
10	3.7	3.0	1.4
9	4.2	3.4	2.8
8	6.0	3.6	2.3
7	5.6	4.4	3.3
6	9.3	4.8	5.2
5	8.8	5.2	6.0
4	7.9	5.8	8.8
3	11.6	6.6	8.4
2	9.8	7.0	16.3
1 or less	11.2	15.9	27.4

\*These figures are from Wicks and Sillito (1969:28).



Table 23

PRIMARY REASON FOR SUBSTITUTE TEACHING  
(N = 215)

Reason	Substitutes Reporting	
	f	%
To keep in touch with teaching	57	26.5
To earn extra income to temporarily supplement usual family or personal source of income	75	34.9
To earn income required and essential to provide an adequate standard of living	36	16.7
As a matter of interest and hobby and/or pastime	28	13.0
Others	19	8.8



Table 24  
CAREER PLANS OF SUBSTITUTE TEACHERS  
AND RELATED FACTORS

Factors	Plan to Return to Full-time Teaching					
	Yes (N = 75)		No (N = 81)		Uncertain (N = 59)	
	f	%	f	%	f	%
Percent of Total	-	34.9	-	37.7	-	27.4
Hold Degree	25	33.3	15	18.5	19	32.2
No Degree	50	66.7	66	81.5	40	67.8
Have Children that Require Care	33	44.0	15	18.5	26	44.0
No Children that Require Care	42	56.0	66	81.8	43	56.0





### Attendance of Meetings

Of 215 substitutes, 72.1 percent indicated they had not attended a staff meeting at any school during the 1969-70 school year. Twenty percent indicated they had attended one or two staff meetings, and 7.9 percent indicated they had attended three or more such meetings. Data about substitute teacher attendance at staff meetings are reported in Table 25. Attendance of substitutes at an ATA meeting and attendance at teachers' convention or institutes were reported by 12.3 and 19.6 percent respectively.

### ECONOMIC STATUS OF SUBSTITUTE TEACHERS

Carr-Saunders (1928:3) states that:

The connection between status and remuneration is close, and in their efforts to improve the status of their members professional associations have been led to pay attention to remuneration.

The amount of remuneration that Alberta substitute teachers receive is influenced by policy or position statements of the ATA and the ASTA; however, collective bargaining units within counties, divisions, and districts negotiate the amount of pay for substitute teaching.

### Associational Policy or Position

The ATA (1969:187) adopted the following policy resolution about substitute-teacher pay:

5.A.5a BE IT RESOLVED, that the Provincial Executive Council recommend to bargaining units that substitute teachers be placed on current salary grids and be paid at the rate of not less than 1/200 of the basic salary according to years of teacher education for each day taught.

The position of the ASTA (1969:1) was made in an advisement



Table 25

ATTENDANCE OF SUBSTITUTES AT STAFF MEETINGS  
(N = 215)

Number of Meetings Attended During the 1969-70 School Year	Substitutes Reporting	
	f	%
6	2	.9
5	1	.5
4	5	2.3
3	9	4.2
2	20	9.3
1	23	10.7
0	155	72.1



to member boards and stated that computation of payment to substitutes should be such as to:

- (a) permit employment of substitute teachers as needed
- (b) be simple to administer (which usually means should not take into account training and experience but this depends on the expected function of a substitute)
- (c) comply with The Labour Act and Regulations

#### Basis and Amount of Remuneration

The remuneration received by substitute teachers usually depends on (1) grade taught, (2) years of teacher training, (3) a flat daily amount or (4) one two-hundredth of some grid position which may take into account training or experience or both.

An ATA analysis (1970:5,13) of 60 county or division and 65 district "collective agreements" for the 1968-69 period summarizes how substitute teachers are paid in 90 Alberta systems (Appendix E). The summary indicates that a majority of systems pay substitute teachers at a flat per diem rate which ranges from \$12.00 to \$25.00. Those systems that base pay on grade level taught, generally pay two to four dollars per diem more to substitutes in secondary grades than to those in elementary grades. Systems that base their pay on teacher training usually pay two to four dollars per diem more to degreed personnel than to those without degrees, however, the differential in pay for non-degreed and degreed personnel ranged from \$2.00 to \$12.00 per diem. The analysis indicated that 36 of 90 systems paid substitute teachers one two-hundredth of some grid position. Fourteen of these systems paid on the basis of one two-hundredth of regular salary, while 22 reported payment as one two-hundredth of basic minimums.

During an interview in April, 1970, Mr. D.J. Corse, ATA Teacher Welfare Officer, indicated that during the current school year there



was an increasing trend in collective agreement settlements toward remuneration of substitutes on the basis of one two-hundredth of some salary grid position. This trend has resulted, in part, because of a decision made by the Chief Inspector of the Board of Industrial Relations. The decision or interpretation by the Chief Inspector, reported in the "ATA News" (1970:2), states that:

Pay rates established on a per diem basis where a salary schedule is not applicable for substitute teachers - there is an entitlement to vacation pay (4 percent) as provided in Board of Industrial Relations Order No. 5.

Substitute teachers who are employed and paid a salary determined by taking one two-hundredth of a figure in a grid or schedule negotiated for all teachers employed in a system are deemed to have received the four percent holiday pay.

#### Pay Factors Reported by Substitute Teachers

The mean per diem pay to substitute teachers was \$22.90, ranging from \$17.00 to \$56.00. Substitutes reported that if employed on a full-time basis, one two-hundredth of mean annual salary would be \$34.12, and would range from \$19.00 to \$63.00 per day. The average pay substitutes presently receive is approximately two-thirds of one two-hundredth of present mean regular pay.

Ranking of items in the Likert-type scale in the "Questionnaire to Substitute Teachers" placed "low pay" as the tenth most annoying factor of the 25 items in the scale. Of the 215 respondents, 44.2 percent indicated complete satisfaction and 55.8 percent indicated some degree of dissatisfaction with the "low pay." A score of five (great deal of dissatisfaction) was indicated by 14.9 percent of respondents.

Analysis of variance indicated that a significant difference





at higher than the .01 level existed between responses of substitutes in city systems and in non-city systems for the "low pay" item. There was relatively more dissatisfaction with low pay among substitute teachers in city systems. The greater dissatisfaction with low pay in urban systems may be a result of (1) greater difficulty of carrying out substitute-teacher duties in city schools, (2) flat per diem pay offered by most urban systems and (3) greater economic requirements often associated with urban living. Non-city substitutes are more satisfied with pay and indicated that they are more likely to be involved with their spouse's business which is the primary source of income. Written comments indicated that rural substitutes often teach to "help the school out." Personal relationships with the staff and intimate knowledge of the students and the school make the substitute-teaching task in non-city systems more pleasant than it might be in city systems.

#### OTHER CHARACTERISTICS OF THE SAMPLE

Of the sample, 70 substitutes taught most often in grades one to three, 60 in grades four to six, 60 in grades seven to nine, and 25 in grades ten to twelve.

Substitute teachers taught for an average of 16.2 different teachers during the September 1, 1969 to March 31, 1970 period. The 75 non-city substitutes taught for a mean of 7.4 different teachers, the 62 in small cities for 13.7 different teachers, and the 78 in large cities for an average of 26.6 different teachers. The number of different teachers substituted for, ranged from one to 50.

Table 26 summarizes the years of substitute-teaching experience.



Two-thirds of the substitutes had three or fewer years of substitute-teaching experience. The few years of substitute-teaching experience reported indicated that such work is temporary and teachers either take full-time positions or discontinue substitute work.

Table 27 shows that over two-thirds (68.3 percent) of the substitutes reported that they had rendered service for six or seven months during the September 1, 1969 to March 31, 1970 period. Of those that reported five or fewer months service the greatest number reported three months service. The three-month service group would be those teachers who decided to offer their services as substitute teachers following the Christmas holiday. During the seven-month period substitutes offered their services for a mean of 5.74 months and taught for a mean of 37.87 days. The number of days taught ranged from 3 to 130.

#### SUMMARY OF CHAPTER 5

Typically, substitute teachers in Alberta are middle-aged married women with one or more dependent children, and are occupied with domestic duties on days when not employed as substitute teachers. Generally, substitute teachers have less experience as full-time teachers, have less teacher and/or university education, and have not completed a university credit course for ten or more years. About two-thirds of substitutes held full-time teaching positions five or fewer years ago and two-thirds plan to return to full-time teaching or are uncertain whether they will do so in the near future. Few substitute teachers attend staff meetings, ATA meetings, institutes or conventions.

Substitute teachers are employed for approximately 30 to 40 days



Table 26

YEARS OF SUBSTITUTE TEACHING EXPERIENCE  
(N = 215)

Number of Years of Substitute Teaching	Substitutes Reporting	
	f	%
9 or more	23	10.8
8	10	4.7
7	5	2.3
6	7	3.3
5	11	5.2
4	14	6.6
3	35	16.4
2	41	19.2
1	69	31.5



Table 27

NUMBER OF MONTHS OF SERVICE RENDERED BY SUBSTITUTE TEACHERS  
FROM SEPTEMBER 1, 1969 TO MARCH 31, 1970  
(N = 215)

Number of Months of Service Rendered*	Substitutes Reporting	
	f	%
7	115	53.5
6	31	14.5
5	17	7.9
4	17	7.9
3	20	9.3
2	10	4.7
1	5	2.3

\*Mean number of months taught = 5.74





each school year and render service, on the average, for more than 16 different teachers. In larger school systems substitutes teach a greater mean number of days and for a greater number of teachers. The majority of substitute teachers are motivated primarily by monetary reasons although remuneration is usually one-half to two-thirds of what their daily earnings would be if employed as full-time teachers. Remuneration is most commonly a flat per-diem rate although the trend is toward payment on the basis of one two-hundredth of some grid or schedule position.

Chapter six deals with working relationships between substitute and regular teachers and with factors that are problematic to substitute teachers in carrying out their role.



## Chapter 6

### PROBLEMS EXPERIENCED BY SUBSTITUTE TEACHERS

This chapter presents an analysis of the nature and degree of problems experienced by substitute teachers. Data for these analyses were obtained from the responses to the 25 item scale in Part II of the "Questionnaire to Substitute Teachers." Characteristics of the sample of 125 regular-classroom teachers are described briefly, and an analysis of their responses to the eleven-item scale in Part II of the "Questionnaire to Regular Classroom Teachers" is included. A summary of questionnaire comments made by substitutes and by regular teachers concludes the chapter.

### ANALYSES OF SUBSTITUTES' RESPONSES TO SCALE ITEMS

The frequency distribution of substitute-teacher responses and the means for each of the 25 scale items are summarized in this section. Items are ranked according to (1) the mean and (2) the number of non-zero responses.

#### Frequency Distribution and Rank Ordering of Responses

Responses made by substitute teachers to the 25 Likert-type scale items in Part II of the "Questionnaire to Substitute Teachers" are summarized in Table 28. Items were numbered in the same way as in the questionnaire sent to substitute teachers (Appendix C); however, items were ranked and listed in sequence of decreasing means when "0" responses (no difficulty or annoyance with the item) were excluded in



Table 28

FREQUENCY DISTRIBUTION OF SUBSTITUTE TEACHER RESPONSES TO TWENTY-FIVE  
 LIKERT-TYPE SCALE ITEMS AND RANKING OF ITEMS ACCORDING TO MEANS  
 WHEN ZERO RESPONSES ARE INCLUDED AND WHEN EXCLUDED  
 (N = 215)

Item	Dissatisfaction									
	Frequency Responding					Zeros Included		Zeros Excluded		
	None	1	2	3	4	5	Rank	Mean	Rank	Mean
48. Lack of welfare provisions	97	12	26	20	18	42	4	1.89	1	3.44
49. Lack of concern of the teaching profession con- cerning substitute teaching	62	19	35	49	19	31	2	2.17	2	3.05
47. Low pay	95	23	28	27	10	32	10	1.67	3	3.00
30. Lack of personal information about students	49	43	26	43	34	20	3	2.14	4	2.77
50. Unqualified personnel performing as substitutes	149	20	10	15	10	11	21	.84	5	2.73
42. Student behavior	33	42	38	50	34	18	1	2.30	6	2.70
40. Inefficient methods of assigning substitutes	152	19	13	13	7	11	23	.78	7	2.65
46. Unconcern of substitutes for their own welfare and professional growth	80	30	38	36	12	19	11	1.66	8	2.64



Table 28 (Continued)

Item	Dissatisfaction									
	Frequency Responding					Zeros Included		Zeros Excluded		
	None	1	2	3	4	5	Rank	Mean	Rank	Mean
34. Failure to be oriented about equipment and supplies	70	45	28	36	21	15	7	1.71	9	2.54
31. Regular teachers expect substitutes to forgo prep periods, spares etc.	148	23	13	13	9	9	22	.79	10	2.52
32. Shortness of notice	77	45	31	25	22	15	12	1.60	11	2.50
29. Lack of contact with regular teachers	92	44	22	24	18	15	17	1.43	12	2.50
28. Attitude of regular teachers towards substitute teachers	102	36	27	24	15	11	18	1.29	13	2.45
45. Lack of concern by regular teachers for substitute-teacher problems	78	44	38	23	12	20	13	1.57	14	2.14
39. Uncertainty about return of the regular teacher	64	53	36	24	24	14	8	1.69	15	2.40
33. Failure to be oriented about school routines	62	54	40	20	29	10	9	1.67	16	2.35
43. Lack of information about courses of study	52	54	41	40	13	15	6	1.78	17	2.35





Table 28 (Continued)

Item	Dissatisfaction									
	Frequency Responding					Zeros Included		Zeros Excluded		
	None				Great	Rank	Mean	Rank	Mean	
	0	1	2	3	4	5				
44. Lack of supplies and materials of special help to substitute teachers	72	48	34	39	13	9	15	1.53	18	2.31
41. Failure of full-time staff to express appreciation for substitute service	123	40	16	16	10	10	20	.98	19	2.28
26. Lack of adequate lesson plans left by regular teacher	44	49	53	51	10	8	5	1.80	20	2.27
35. Assignment to grades or subjects outside of training and experience	69	49	37	39	14	7	14	1.54	21	2.27
27. Failure of regular teacher to prepare students to work with substitutes	71	46	45	34	9	10	16	1.51	22	2.25
38. Failure to inform substitute of extra duties	112	44	21	19	8	11	19	1.07	23	2.23
36. Lack of help from central office	136	35	21	11	6	6	25	.76	24	2.08
37. Lack of help from in-school administrators	131	42	18	14	6	4	24	.76	25	1.95



calculation of the mean. Items were also ranked according to means when "0" responses for each item were included. This latter system of ranking items according to means produced a rank order identical to that which would result from using a "1" to "6" response scale. However, the first system of ranking included only those respondents who indicated some degree of difficulty or annoyance with the problem expressed by the item, and different rank order of items resulted.

The advantages of eliminating respondents that indicated zero to an item seem to be that (1) only respondents who actually perceived some degree of difficulty or annoyance were included, (2) respondents annoyed by or suspicious of the questionnaire who mechanically record zeros to all or most items are excluded and, (3) respondents who give a zero response because they do not understand an item or have not considered implications of an item are eliminated. The elimination of those respondents who indicated zero to an item provided a more accurate description of the respondents who actually experienced some degree of difficulty or annoyance; however, this does not provide a description of the entire sample.

#### Rank Order of the Items with the Highest Means

Table 28 shows that lack of concern of the teaching profession about substitute teaching, lack of personal information about students, lack of welfare provisions, and student behavior each occupied one of the first six ranks when means were calculated including and excluding zero responses. Item 26, lack of adequate lesson plans was ranked fifth when mean was calculated including zero, and ranked twentieth when zero responses were excluded. Low pay, item 47, and unqualified



personnel performing as substitutes, item 50, were ranked third and fifth when means were calculated when zero responses were excluded, and ranked tenth and twenty-first respectively when zero responses were included in the calculation of means.

#### Items with the Largest Frequency of Zero Responses

Table 28 shows that on seven of the items more than one-half of the 215 substitute teachers indicated no dissatisfaction with the factor expressed by the item. The large number of "0" responses for some items indicates that for the majority of substitutes the factor expressed by the item was not a problem. Zero was indicated by 152 respondents to item 40, inefficient methods of assigning substitutes, 149 indicated zeros to item 50, unqualified personnel performing as substitutes, and 148 indicated zeros to item 31, regular teachers expect substitutes to forgo prep periods, spares etc.. Although the three items mentioned above were not problematic to a majority of substitutes, written comments by those experiencing problems indicated a high degree of dissatisfaction, annoyance or unfairness.

Other factors with a majority of zero responses were item 36, lack of help from central office, item 37, lack of help from in-school administrators, item 41, failure of full-time staff to express appreciation for substitute services, and item 38, failure to inform substitutes of extra duties. Zero responses to these items indicated no difficulty or annoyance with these factors; however, the zero responses may also express that substitutes do not expect assistance, praise or information as indicated in these items.



### Rank of Items by Frequency of Non-Zero Responses

Items were ranked according to the number of non-zero responses. The greatest number (182 of 215) of substitutes indicated some degree of difficulty with student behavior. This was followed by lack of adequate lesson plans (171), lack of personal information about students (166), lack of information about courses of study (163), and lack of concern of the teaching profession concerning substitute-teacher services (153). The nature of the ten most frequently mentioned items as summarized in Table 29 indicates that most substitute teachers are primarily concerned about students and effective teaching rather than about their own self-interest.

Lambert (1955) requested that substitute teachers list in order of seriousness the three most serious obstacles to effective substitute-teacher work. The five most frequently mentioned obstacles to effective substitute work, in order of frequency of mention, listed by Lambert (1955:137) were:

1. Lack of adequate lesson plans
2. Shortness of advance notice
3. Lack of personal information about pupils - seating charts to identify them, personal characteristics, etc.
4. Failure to acquaint substitutes with special rules, routines, and schedules in particular schools
5. Student behavior - disciplinary problems

Comparison of the rankings in Table 29 to the first five items listed by Lambert indicated that there was a great deal of similarity between the responses of substitutes in both studies. Shortness of advance notice was, comparatively, not as much of a problem to Alberta substitutes. However, lack of information about courses of studies was ranked higher as a problem more often by substitutes in the present study. The higher ranking given to the latter item may relate closely







Table 29  
RANK OF THE TEN ITEMS HAVING THE GREATEST  
FREQUENCY OF NON-ZERO RESPONSES  
(N = 215)

Rank	Item	Non-zero Responses f
1	42. Student behavior	182
2	26. Lack of adequate lesson plans left by the regular teacher	171
3	30. Lack of personal information about students	166
4	43. Lack of information about courses of study	163
5	49. Lack of concern of the teaching profession at large concerning substitute-teacher services	153
6	33. Failure to be oriented about school routines	153
7	39. Uncertainty about return of the regular teacher	151
8	35. Assignment to grades or subjects out- side of training and experience	146
9	34. Failure to be oriented about equipment and supplies	145
10	27. Failure of regular teacher to prepare students to work with a substitute teacher	144



to lack of adequate lesson plans. That is, at times, substitutes are at a loss concerning what work students ought to be doing. Lack of concern of the teaching profession about substitute services ranked fifth in the present study but was not mentioned in the Lambert study .

#### Analysis of Variance - Grouping by Location of Systems

The sample was divided into three groups consisting of 75 substitutes in non-city systems, 62 in small-city systems, and 78 in large-city systems. Items with a p value of .10 or less were considered to have significant differences between group-mean dissatisfaction scores. Results of the analysis of variance reported in Table 30 indicated that fifteen items showed a significant difference between means. Examination of the probability matrices for the Scheffe multiple comparison of means showed that means were significantly higher for large-city systems than for non-city systems on 13 of the 15 items. This finding suggests that for all substitutes, there is relatively less dissatisfaction experienced by non-city substitutes concerning the factors analysed than for substitutes in large-city systems.

Item 32, "shortness of notice," had a significantly higher mean for non-city substitutes than for substitutes in large cities. This is probably a result of greater and more difficult travelling distances, poorer communication, less efficient means of dispatching substitutes, and characteristics of the persons who substitute teach in non-city systems.

Item 40, "inefficient methods of assigning substitutes," had a significantly higher mean for small-city systems than for large-city systems, indicating that substitutes in small-city systems felt that



assignments were often made on the basis of politics and personal friendship. Comments on the questionnaires gave strong indication of dissatisfaction of the method of assignment of substitutes in small cities. Anonymity of personnel and sociological distance in large-city systems reduces dissatisfaction even though similar methods of assigning substitute teachers may be used in both small and large city systems.

#### Analyses of Variance when Zero Responses Were Excluded

An analysis of variance was carried out with each of the 25 items in the Likert-type scale when zero responses were eliminated for each item. This permitted tests of significance of the differences between means of those respondents in non-city, small-city, and large-city systems who indicated some degree of difficulty or annoyance with the problem expressed by an item. The number of substitutes in each group differed in each group for each item. This item by item analysis of variance indicated that no significant difference of means at the .10 level was evident in 24 of the items. The results suggest that the degree of difficulty or annoyance is similar for substitutes in non-city, small-city, and large-city systems when only those respondents that indicated some degree of problem with a particular item were included.

Item 39, uncertainty regarding the return of the regular teacher, was significant at higher than the .01 level. The mean for large cities was significantly higher than the means for either small-city or non-city systems. The higher mean for substitutes in large cities may be a result of the method used to terminate substitute assignments. In large-city systems, substitutes are generally notified that their services will no longer be required on the morning when the regular



Table 30

ANALYSIS OF VARIANCE ON GROUPING OF SUBSTITUTES BY LOCATION OF SCHOOL SYSTEMS WHEN ZERO RESPONSES WERE INCLUDED, AND IDENTIFICATION OF ITEMS WHERE GROUP-MEAN DISSATISFACTION SCORES SHOWED A SIGNIFICANT DIFFERENCE AT THE .10 LEVEL

Item	Mean Dissatisfaction Scores of Groups that Differed at the .10 Level of Significance		
	Non-City (N = 75)	Small-City (N = 62)	Large-City (N = 78)
27. Failure of regular teacher to prepare students to work with a substitute teacher	1.160		1.769
28. Attitude of regular teachers toward substitutes	.880		1.603
29. Lack of contact with regular teachers	1.213		1.782
31. Regular teachers expect substitutes to forgo prep periods etc.	.253	.774	1.307 1.307
32. Shortness of notice	1.853		1.256
34. Failure to be oriented about equipment and supplies	1.360		1.910
37. Lack of help from in-school administrators	.453	.661	1.141 1.141
40. Inefficient methods of assigning substitute teachers		1.080	.538
41. Failure of full-time staff to express appreciation for service	.667	.838	1.385 1.385
42. Student behavior	2.013		2.603
44. Lack of supplies and materials of special help to substitutes	1.293		1.897
45. Lack of concern by regular teachers for substitute problems	1.093		1.936





Table 30 (Continued)

Item	Mean Dissatisfaction Scores of Groups that Differ at the .10 Level of Significance		
	Non-City (N = 75)	Small-City (N = 62)	Large-City (N = 78)
47. Low pay	.933 .933	1.919	2.192
48. Lack of welfare provisions	1.240 1.240	2.032	2.397
49. Lack of concern of the teaching profession at large concerning substitute teaching services	1.720		2.474



teacher returns. This would have a disruptive effect on any plans the substitute had for the day or might have made for the day.

#### Analysis of Variance - Grouping by Grades

An analysis of variance was conducted on the 25 scale items by grouping substitutes on the basis of grade level at which they most often taught. The four groups consisted of 70 substitutes (grades 1-3), 60 substitutes (grades 4-6), 60 substitutes (grades 7-9), and 25 substitutes (grades 10-12). Significant differences between group means were indicated for eight items. Those items that showed significant differences at the .10 level are summarized in Table 31. The summary shows that where a significant difference was indicated the difference was usually between the mean for substitutes in the grades 7-9 group and the mean of either the grades 1-3 group or the grades 4-6 group. Although only eight of the items showed significant differences between group means, examination of means for all items indicated that the mean for the grades 7-9 group was higher than the means for the other three groups on 22 of the items. These findings suggest that substitutes who usually teach at the grades 7-9 level experience the greatest amount of difficulty in carrying out their tasks as substitute teachers. An exception was item 38, failure to inform substitutes of extra duties, where the difference between the mean for the grades 10-12 group was significantly higher than the mean for the grades 7-9 group at the .10 level.

#### ANALYSES OF RESPONSES OF REGULAR TEACHERS TO SCALE ITEMS

This section gives a brief description of the sample of 125 teachers that responded to the eleven item Likert-type scale in Part II



Table 31

ANALYSIS OF VARIANCE ON GROUPING OF SUBSTITUTES BY GRADES TAUGHT  
WHEN ZERO RESPONSES WERE INCLUDED, AND IDENTIFICATION OF  
ITEMS WHERE GROUP-MEAN DISSATISFACTION SCORES SHOWED  
A SIGNIFICANT DIFFERENCE AT THE .10 LEVEL

Item	Mean Dissatisfaction Scores of Groups that Differed at the .10 Level of Significance			
	Grades			
	1 - 3	4 - 6	7 - 9	10 - 12
26. Lack of adequate lesson plans left by regular teacher		1.283	2.283	
27. Failure of regular teacher to prepare students to work with a substitute teacher	1.186	1.233	2.167 2.167	
28. Attitude of regular teachers toward substitute teachers	.829		1.867	
35. Assignment to grades or subjects outside of training and experience	1.214	1.300	2.017 2.017	
36. Lack of help from central office personnel	.514		1.183	
38. Failure to inform substitute of extra duties			1.250	.360
42. Student behavior	2.029	2.117	2.883 2.883	
43. Lack of information about courses of study		1.517	2.250	



of the "Questionnaire to Regular Classroom Teachers" (Appendix D).

Responses to scale items were analysed by giving frequency distributions, ranking by means, and ranking by number of non-zero responses.

#### Description of the Sample of Regular Classroom Teachers

The sample of 125 regular classroom teachers consisted of 32 males and 93 females of which 21 were single, 94 were married and 10 were widowed, divorced or separated. The mean age of the respondents was 37.76 years. The sample consisted of 33 division one teachers, 39 division two teachers, 31 division three teachers, and 22 division four teachers. Forty of the teachers taught in large cities, 44 in small cities, and 41 taught in non-city systems. On the average, teachers in the sample had their classes taught by 3.31 different substitutes during the September 1, 1969 to March 31, 1970 period and number of different substitutes ranged from one to twenty. Regular teachers utilized substitute services for a mean of 10.21 days during the seven month period, and usage ranged from three to 52 days. The mean years of teacher training was 3.23 years and the modal number for the sample was four years of training. Teachers had 13.26 years of teaching experience.

Of the 125 regular teachers, 59 favored having a corps of full-time substitute teachers, 49 favored the "on-call" system of providing substitute services as is commonly done at present, 12 favored additional preparation periods which would be used for substitute purposes when a fellow staff member was away, and five indicated they would prefer other systems. Three of those who indicated "other" suggested assigning "on-call" substitute teachers to specific schools rather than sending





them throughout the entire system and changing schools every few days.

### Frequency Distribution and Ranking of Responses

Responses made by regular classroom teachers to the eleven Likert-type scale items in Part II of the "Questionnaire to Regular Classroom Teachers" are reported in Table 32. Items were numbered in the same way as in the questionnaire to regular teachers (Appendix D). The frequency distribution indicated the numbers reporting some degree of dissatisfaction for each item. Items were ranked according to means when zero responses were included and when zero responses were excluded in calculation of the means.

### Rank Order of Items by Means

The rank ordering of the eleven items according to means were similar whether zero responses were included or excluded in calculation of the means. Inadequate supply of "good" substitute teachers to replace regular teachers, and lack of contact between substitutes and regular teachers ranked either first or second. The third and fourth most dissatisfaction was that substitutes failed to outline or indicate what work had been covered and, that substitute teachers seemed to perform as babysitters and policemen. Increase of discipline problems following utilization of a substitute teacher and failure of substitutes to follow lesson plans were ranked fifth and sixth respectively. The remaining five items were considered to be the source of less dissatisfaction.

### Rank of Items by Frequency of Non-Zero Responses

With the exception of items 11 and 17, which were in reverse rank order, the ranking of the eleven items by number of non-zero



Table 32

FREQUENCY DISTRIBUTION OF REGULAR CLASSROOM TEACHER RESPONSES TO ELEVEN  
 LIKERT-TYPE SCALE ITEMS AND RANKING OF ITEMS ACCORDING TO MEANS  
 WHEN ZERO RESPONSES ARE INCLUDED AND WHEN EXCLUDED  
 (N = 125)

Item	Dissatisfaction									
	Frequency Responding					Zeros Included		Zeros Excluded		
	None 0	1	2	3	4	5	Rank	Mean	Rank	Mean
13. Lack of contact between the regular teacher and the substitute teacher	32	18	11	23	17	24	2	2.38	1	3.19
21. Inadequate supply of "good" substitute teachers	26	18	22	20	16	23	1	2.41	2	3.04
15. Failure of substitutes to leave an outline or other indication of work completed	34	25	17	15	19	15	3	2.04	3	2.80
12. Substitute teachers seem to perform mainly as baby sitters, policemen etc.	36	27	15	25	11	11	4	1.85	4	2.60
17. Discipline problems seem to increase following the services of a substitute	44	29	17	13	12	10	5	1.60	5	2.47
11. Failure of substitute to follow lesson plans prepared for him/her	43	26	22	24	8	2	6	1.47	6	2.24



Table 32 (Continued)

Item	Dissatisfaction									
	Frequency Responding					Zeros Included		Zeros Excluded		
	None	1	2	3	4	5	Great	Rank	Mean	Rank
	0									
14. Failure of substitute teachers to associate with regular teachers	63	27	9	18	5	3		8	1.07	7
19. Professional ethics (conduct) of substitutes is lacking	86	17	10	5	3	4		10	.67	8
16. Substitute teachers dis-organize materials, facilities etc.	45	35	20	11	7	7		7	1.37	9
18. Confidential information about students is divulged by substitute teachers	95	16	7	2	1	4		11	.48	10
20. Substitute teachers provide bad "public relations" or "public image" of the teaching profession	73	25	13	7	4	3		9	.82	11



Table 33

RANK BY FREQUENCY OF NON-ZERO RESPONSES OF REGULAR CLASSROOM  
TEACHERS TO THE ELEVEN LIKERT-TYPE SCALE ITEMS  
(N = 125)

Rank	Item	Non-zero Responses f
1	21. Inadequate supply of "good" substitutes	99
2	13. Lack of contact between regular teachers and the substitute teacher	93
3	15. Failure of the substitute to leave an outline or work completed	91
4	12. Substitute teachers seem to perform mainly as baby sitters, policemen etc.	89
5	11. Failure of the substitute to follow lesson plans prepared for him/her	82
6	17. Discipline problems seem to increase following the services of a substitute	81
7	16. Substitute teachers disorganize materials, facilities etc.	80
8	14. Failure of substitute teachers to associate with regular teachers	62
9	20. Substitute teachers provide bad "public relations" or "public image" for/of the teaching profession	52
10	19. Professional ethics (conduct) of substitute teachers is lacking	39
11	18. Confidential information about students is divulged by substitute teachers	30





responses produced an identical ranking to that which resulted when items were ranked according to means when zero responses were included.

#### WRITTEN COMMENTS MADE BY SUBSTITUTES AND REGULAR TEACHERS

This section summarizes comments made at least eight times by respondents at the end of questionnaires.

##### Comments Made by Substitute Teachers

Ninety-eight of the 215 questionnaires from substitute teachers had written comments and such comments ranged from one or two sentences to one or two pages. Generally comments were made by those respondents who indicated difficulty with a number of the factors expressed in the Likert-type scale. Few comments were made by respondents who replied "0" or "1" to most or all of the scale items. Most comments enlarged on factors mentioned in the Likert scale. A summary of the comments made by substitute teachers about the difficulties and annoyances experienced in performing their functions follows.

Extra duties. Substitute teachers are often expected to do supervision duty (recess, lunchroom, playground, buses etc.) from the time they arrive at a school. Substitutes indicated that time was required to become oriented, and to prepare or become acquainted with lessons. Often regular teachers and administrators were inconsiderate with respect to extra duties, especially during the first day.

Teachers' Association. Substitutes reported dissatisfaction with having to pay ATA fees and having to pay into the Teachers' Retirement Fund without enjoying the concomitant benefits. Pension contributions are refundable after a considerable lapse of time.



Substitute teachers are generally not informed of, and do not feel welcome at conventions, ATA meetings, social functions and other association-sponsored events. They indicated that the association was relatively alien to their professional needs.

Pay. Substitute-teacher pay is negotiated between negotiating teams of regular teachers and school boards. Substitutes have minimal representation on teacher economic policy committees. Pay is usually one-half to two-thirds of what regular pay would be, and some systems fail to make payment until well past the end of a month. Substitutes feel the large variation among school systems in number of consecutive days that must be taught in one position before full salary is paid is often grossly unfair. Termination of an assignment one day short of retroactive full pay was reported as especially unfair. Substitutes reported that they did not receive sick leave benefits or credit for teaching experience even though 150 or more days of service were rendered during a school year.

Discipline. Discipline at the junior high school level was frequently reported as problematic. Substitutes reported that because of the temporary nature of assignments they felt that administrators did not give due attention to their discipline problems.

Lesson plans. Comments varied concerning lesson plans left for the substitute teacher by the regular teacher. Substitutes reported that plans were inadequate, lacked detail, were too inflexible or non-existent. On the other hand, comments indicated situations where plans, materials, instructions and other factors made it possible to maintain or achieve a high level of accomplishment. Comments about plans were



made with respect to expected absence of the regular teacher.

Attitude. Comments indicated that attitude of regular teachers toward substitutes was occasionally negative. Substitutes felt they were considered as outsiders, intruders or as necessary evils. A few comments indicated refusal of substitutes to return to certain schools due to the attitude of the regular staff.

Politics. Politics and favoritism were reported in comments from substitutes in non-city and small-city systems. Teachers who had recently moved into an area reported that they felt established substitutes received better and more frequent assignments. Comments indicated the unfairness of diligently carrying out substitute-teacher assignments during the severe winter months only to be replaced by intern teachers or other new teachers during the May-June period.

#### Comments Made by Regular Classroom Teachers

Teachers were asked to suggest ways that substitute services could be improved and to make comments concerning substitute-teaching services. Seventy-seven of the 125 questionnaires from regular classroom teachers contained written comments. Generally, comments were half a page in length and were positive, constructive, and sympathetic toward substitute teachers. A summary of the comments made by regular teachers follows.

Selection of substitutes. Regular teachers indicated the importance of careful selection of substitute teachers, as some had experienced extreme disorganization of their classes as a result of having a person in their classroom, for a day or two, who they





considered were totally unfit to be in a classroom. Teachers indicated that substitute teaching was a specialist function and ought to be performed by teachers with a high degree of training, experience, and versatility. A few respondents indicated that university students often did not have the required background to carry out the functions of a substitute teacher effectively. A few teachers complained of uncertified personnel functioning as substitutes.

Assignment of substitute teachers. Comments made by teachers at the high school level and those in specialist areas, indicated that often substitutes can do little except "baby sit" due to the specialized nature of the subject matter. Teachers in large systems felt that often substitutes are not assigned to positions suited to their training and experience. A frequently mentioned comment was that substitutes ought to be assigned to only a few schools so that they could become familiar with various aspects of the schools and hopefully be able to perform their function more effectively and more easily.

Inservice training. Regular teachers indicated that, with course changes and the lack of contact between substitutes and regular classroom teachers, institutes and workshops ought to be instituted by school boards and teachers' and trustees' associations.

Expectations for substitutes. There was little consensus among regular teachers about what was expected of substitute teachers. Some felt that the substitute ought to follow plans exactly while others felt that any special talents or skills a substitute could offer to students was acceptable. Opinions about what was expected of a substi-





tute teacher varied from "do as I say" to "do as you can." One area of consensus was that the substitute was expected to leave an outline or an indication of the work completed.

#### SUMMARY OF CHAPTER 6

Frequency distributions of responses for each item showed the number of respondents that indicated they had no problems and the numbers that had various degrees of problems. When items were ranked by means, different rank orders resulted depending upon inclusion or exclusion of zero responses. Discipline, lack of lesson plans and lack of personal information about students ranked highest when items were ranked according to number of non-zero responses.

Analysis of variance showed that substitute teachers in large-city systems generally experienced a greater degree of dissatisfaction, annoyance or difficulty in carrying out their functions as substitute teachers than did substitutes in non-city and small-city systems. When zero responses were excluded analysis of variance indicated that the degree of dissatisfaction generally did not differ significantly for substitutes in different sizes and types of systems. Analysis of variance indicated that generally substitutes at the grades 7-9 level experience more dissatisfaction and difficulty in carrying out their roles than substitutes at other grade levels.

Regular classroom teachers indicated that lack of contact between themselves and substitute teachers, inadequate supply of "good" substitute teachers, and failure of substitutes to leave an outline of work completed were the major annoyances they experienced with substitute services.



Both substitute and regular teachers indicated in written questionnaire comments the importance of the substitute teaching function and the need to upgrade and improve the service. The need for coordination and integration of substitute-teacher services with services of regular teachers through improved communication between substitutes and regular teachers was emphasized.



## Chapter 7

### SUMMARY AND CONCLUSIONS

The purpose of this study was to determine the status of substitute teachers in Alberta school systems. Specific purposes of the study were to examine the extent of substitute teacher utilization, to examine the extent of school board policies concerning substitutes, to compile statistics about the personal and professional characteristics of substitutes, and to examine the nature and degree to which certain factors about substitute teaching were problematic to substitutes and to regular teachers. This chapter provides a summary of the study, states conclusions arising from the study, and gives suggestions for further related studies.

#### Summary of Findings

To a large extent, Alberta school boards govern the nature of substitute teacher services within their jurisdictions. There is a wide variety of school-board policies, rules, regulations, and operational procedures about substitute teacher services. There appears to be a recent increase in concern about substitute teachers and presumably this concern of school board members and of administrators is about both teacher and pupil personnel. The nature of policies indicated a good deal of concern about financial matters and about the availability of substitutes. However, concern about the value and quality of service seemed secondary. This was evidenced by absence of substitute-teacher handbooks or brochures, weak or non-existent systems of evaluation, and



variations in systems of pay that are often baseless and discriminatory.

This study has indicated that the utilization of "on-call" substitutes or "day-to-day teachers" is a widespread practice in Alberta schools. During the 1968-69 school year 2,572 substitute teachers were employed in the systems surveyed in this study. This suggests that in all Alberta school systems there were probably over 3,000 persons who served as substitute teachers during the 1968-69 school year. Substitutes taught an average of 32.67 days during 1968-69, and students were taught by substitute teachers for an average of 4.76 days.

Most commonly, the substitute teacher is a married woman with a slightly higher mean age than the mean age of teachers in the regular teaching force. Generally, the substitute has one or more dependent children and when not substitute teaching, domestic duties are the primary activity. On the whole, substitutes are less qualified and have less teaching experience than regular teachers. Nevertheless, there is a substantial percentage of well-qualified persons who do substitute-teacher work. A large percentage of substitutes plan to return to full-time teaching or were uncertain about such plans. This suggests that many substitutes are teachers who have interrupted their careers for family or other reasons.

Relative to one two-hundredth of regular pay, substitutes are generally poorly paid where remuneration is a flat per diem rate. The disparity between one two-hundredth of regular pay and pay as a substitute increases when teachers are highly qualified but remuneration remains a flat rate. Generally, substitutes receive between one-half and two-thirds of the pay they would receive as regular teachers. If a substitute is well qualified and versatile, and the substitute-





teacher function is considered to be a "specialist" function, then those systems paying a flat per-diem rate generally pay at a low rate for services of such personnel. There is considerable variation in the number of consecutive days of teaching service that must be rendered in the same position before a substitute teacher receives full pay as a regular teacher.

Substitute teachers often render service in many different schools and are confronted with a variety of different students, teachers, administrators, rules, regulations, courses, grades and other factors that affect the function of any teacher. In large city systems substitute teachers generally teach for more days per year, in more different schools and classrooms, and are, in more cases, less satisfied with being substitute teachers than are substitutes in non-city systems and small-city systems. Substitute teachers at the junior high school level also indicated less satisfaction with substitute teaching than substitute teachers at other grade levels.

Lack of concern of the teaching profession concerning substitute teaching services, lack of welfare provisions, low pay, student behavior, lack of personal information about students, and lack of information about courses of study were the factors that the greatest number of substitutes identified as being problematic. These same factors are those that produce the highest degree of dissatisfaction among substitute teachers.

Regular teachers reported lack of an adequate supply of "good" substitute teachers, lack of contact with substitutes, and failure of substitutes to leave indication of work completed as the three most annoying factors about substitute services. Regular teachers indicated



that generally the use of "on-call" substitutes at the high school level was not satisfactory and that "on-call" substitutes ought to be assigned to only a few schools within a system rather than to all schools in a system.

### Conclusions

The use of "on-call" substitute teachers to replace absent regular classroom teachers is a common practice in Alberta. A large number of persons with various backgrounds do substitute-teacher work. It is the responsibility of school boards and their administrators to have adequate policies, rules, regulations, and operational procedures which clearly define the functions of substitute teachers in such a way that substitute services will complement the services of regular teachers. Selection, assignment, orientation, evaluation, remuneration, inservice programs and other related factors should be as important and as carefully planned and carried out with substitute teachers as with regular teachers. Provision of a substitute-teacher handbook or brochure jointly produced by substitutes, regular teachers, administrators, and board members can provide a good basis for the improvement of substitute services. Administrative procedures which rely primarily on the ease of terminating a substitute teacher's assignment as a basis of administering such personnel are irresponsible.

Costs of substitute services are a legitimate concern of school boards. Increased pay does not assure better quality of service. However, systems of pay should bear a relationship to training and experience of the substitute. Remuneration systems that reward all substitutes, regardless of training or experience, on the same basis



are usually grossly unfair.

The personal and professional background of substitute teachers suggests that inservice training through institutes, meetings, orientation seminars, and other means should be part of any personnel program in order to upgrade substitute services and to coordinate such services with those rendered by regular teachers. Regular teachers as well as substitute teachers often do not clearly understand the relationships between their functions. There is a need for contact and communication between substitute teachers and regular classroom teachers.

Administrators at the school level play an important role in determining the effectiveness of substitute teacher services. Proper orientation of the regular teachers, of the student body, of other school personnel, and of the incoming substitute teacher are important functions for the school principal or his assistant. The attitude and actions of a principal or vice-principal can easily set expectations for a substitute and for the students.

The use of "on-call" substitutes in Alberta school systems has become an institutionalized type of service. There is no evidence to indicate that the system of using "on-call" substitutes, as is presently done in Alberta, is the most effective and efficient means of providing instruction to students when the regular teacher is away. Evidence in this study indicates that in junior high school grades substitutes experienced discipline and other problems, and regular teachers indicated the difficulty of obtaining capable substitutes for high school subject areas.

Generally, Alberta school systems have been relatively unimaginative in methods employed for providing instruction to children when





their regular teacher is absent. Full-time, professionally-trained persons in charge of substitute teacher services and responsible for developing training and orientation programs are not found in Alberta school systems even though some of these systems employ hundreds of substitutes annually and spend hundreds of thousands of dollars to provide substitute services. With the advent of team teaching, open area schools, open campus, and other variations of instructional and school organization, changes in substitute services will have to be made. In addition to school systems, organizations such as the Alberta Teachers' Association and the Alberta School Trustees' Association could provide valuable services by focusing their efforts on organizing seminars and workshops to improve and upgrade substitute teacher services. Such organizations could also encourage systems to experiment with alternative methods of providing instruction to children when the regular teacher is absent.

#### Suggestions for Further Study

During the course of the present study three possibilities for further studies became apparent. First, an in-depth study of substitute-teacher services in a major urban school system would provide valuable information for school systems in Alberta cities. Such systems will likely experience the greatest growth in the next decade and will require an examination of their substitute services in order to provide a basis for reorganization and improvement of such services. A second suggestion for further study would be to do a Canada-wide survey of substitute teacher practices and to examine the similarities and differences among substitute services in the different provinces. Such





a study could also examine systems used to accommodate students when teachers are absent in school systems in other countries. A final suggestion for further study is to survey the extent and nature of absenteeism of teachers in Alberta school systems. Such a study would provide a better picture of the extent to which students are accommodated by means other than their regular classroom teachers.

In conclusion, it is important to recognize that in Alberta substitute teachers make up a large human resource which has a potential to contribute in a positive way to the education of young people. How effectively these human resources are utilized depends upon the aims, attitudes, and expectations that educators at all levels hold for such personnel. Imagination and skill on the part of administrators is required to adequately develop and harness the skills and abilities of the more than 3,000 substitute teachers in Alberta.



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APPENDIX A  
CORRESPONDENCE



Appendix A<sub>1</sub>

Copy

PROVINCE OF ALBERTA

MEMORANDUM

FROM: E. K. Hawkesworth  
Director of Field Services

TO: Superintendents of Schools      DATE: February 18th, 1970

Mr. Alex Kozeluk, a graduate student at the University of Alberta has proposed a study of "The Status of the Substitute Teacher in Alberta." This proposed, study, as outlined, offers an opportunity for gathering useful information relative to the role of the substitute teacher in this province. I therefore commend to you the study and Mr. Kozeluk's request for your assistance in completing the questionnaire.

E. K. Hawkesworth





THE UNIVERSITY OF ALBERTA  
EDMONTON 7, CANADA

March 3, 1970

I am a graduate student in the Department of Educational Administration at the University of Alberta. The major purpose of my thesis study is to survey the current status of the substitute teacher in Alberta school systems. A proposal for such a study has been approved by my thesis advisor Professor J. Small. Mr. E. K. Hawkesworth, Director of Field Services, Department of Education, has also indicated his support regarding the usefulness of a study about substitute teachers.

Information will be collected from school systems and from provincial associations regarding the formal employment of substitute teachers. Also, information will be gathered from substitute teachers in Alberta to obtain descriptive statistics and to determine the extent to which certain factors hinder or facilitate their effectiveness. Data collected from "regular teachers" will be used to determine their views about purpose, quality and usefulness of the services rendered by substitute teachers.

I am asking your cooperation in having the enclosed questionnaire completed and returned to me in the enclosed self-addressed envelope prior to March 20th, 1970. I urge you to reply affirmatively to Question No. 9 of the questionnaire. Requests for lists of names and addresses will be made prior to March 30, 1970. The findings of the study should provide educational administrators with information upon which to base decisions about possible changes or improvements in substitute teacher services. For your time and cooperation with respect to my study, please accept my "thanks" in advance.

Yours truly,

Alex Kozeluk





THE UNIVERSITY OF ALBERTA  
EDMONTON 7, CANADA

March 24, 1970

On March 3, 1970 a questionnaire regarding a "Substitute Teacher Study" was forwarded to you. Most school systems have returned the completed questionnaire. May I remind you that I have not received a completed questionnaire from your system?

No doubt you have been especially busy during this time of the school year, and perhaps the questionnaire required more of your time than I anticipated. However, I would appreciate the return of the questionnaire (completed, if at all possible).

Please accept my "thanks" if the questionnaire has already been forwarded. If for some reason you have not received the questionnaire please notify me. A copy of the covering letter is enclosed. I am looking forward to hearing from you.

Yours sincerely,

Alex Kozeluk







THE UNIVERSITY OF ALBERTA  
EDMONTON 7, CANADA

April 3, 1970

Thank you for returning the completed questionnaire regarding a study about Substitute Teaching in Alberta and for volunteering to participate by supplying names and addresses. Would you please note the following factors when compiling the requested number of names and addresses:

Substitute Teacher List

- (1) This list should consist of "on-call" substitutes that have provided 3 or more days of substitute service during the current school year in your school system.
- (2) The list should be a random selection of all the available "on-call" substitutes (i.e. do not specifically select those that have substituted most, those that are most dependable, those in one locality etc.).

Regular Classroom Teacher List

- (1) This list should consist of regular classroom teachers that have required the services of "on-call" substitutes for 3 or more days during the current school year.
- (2) This list should be a random selection from all teachers (i.e. do not specifically select those who most often use substitute services, or those that seem to habitually require such services etc.).

Format pages for names, addresses and number requested are enclosed. Use the reverse side and/or additional pages if required. If you already have the required list and can forward it to me do not bother transferring it to the format pages. I would appreciate receiving the lists prior to April 15th, 1970, so that questionnaires can be mailed in April and do not reach substitutes and regular teachers during the very busy May-June period.

Questionnaires were designed to require minimum time on the part of respondents (15-20 minutes for substitute teachers and 10 minutes for regular teachers). Anonymity of respondents is assured. Your cooperation is much appreciated.

Yours sincerely,

Alex Kozeluk



Substitute Teacher ListFormat Page

Name of School System \_\_\_\_\_

Minimum Number Required \_\_\_\_\_ If possible include (approximately)  
equal number of elementary and  
secondary substitutes.

Name and Address of SubstitutesName and Address of Substitutes



Regular Classroom Teacher ListFormat Page

Name of School System \_\_\_\_\_

Minimum Number Required \_\_\_\_\_ If possible include (approximately)  
equal number of elementary and  
secondary level teachers.

Name and Address of Teachers

Name and Address of Teachers

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THE UNIVERSITY OF ALBERTA  
EDMONTON 7, CANADA

April, 1970

Dear Substitute Teacher:

I am conducting a study about Substitute Teachers and Substitute Teacher Services in Alberta. By means of the enclosed questionnaire I hope to gather valuable information for my study. In addition to using the information for thesis purposes in my graduate program in Educational Administration I hope that my findings will in many ways be beneficial to substitute teachers in particular, and Alberta education in general. One of my purposes is to examine the vital and important role that I believe substitute teachers play in Alberta education. To date, little or no compiled information is available about any aspect of substitute teaching. I am soliciting your cooperation in providing much of the information about substitute teaching in Alberta.

I have received an excellent response from Alberta School Superintendents to a questionnaire concerning policies and usage statistics regarding substitute-teacher services in their system. Also, names and addresses have been selected at random by central-office personnel of your system and forwarded to me so that questionnaires could be mailed.

In preparing this questionnaire, a pilot study was conducted with a small number of substitute teachers. In addition to providing valuable information for the revision of my questionnaire the near complete return of all the questionnaires sent, indicated enthusiasm and concern on the part of the respondents and also indicated the need for this type of study. I trust that you will feel the same as you complete the questionnaire. The importance of this study has also been recognized by the Alberta Human Resources Council who have made twelve awards from thirty-five applications during their March, 1970 competition. One such award was made toward this study.

If you are prepared to assist me in this project would you please follow the brief instructions which precede each part of the questionnaire. Attempt to answer all questions. Questionnaires are not identified in any way. A high percentage of return is very important for this study if an accurate description of substitute teaching in Alberta is to be made. A stamped, addressed return envelope is enclosed. Please try to make your mailing date no later than Monday, April 27th, 1970. Your cooperation will be appreciated. Thank you for your time and effort.

Yours sincerely,

Alex Kozeluk







THE UNIVERSITY OF ALBERTA  
EDMONTON 7, CANADA

April, 1970

Dear Teacher:

I am conducting a study about Substitute Teachers and Substitute Teacher Services in Alberta. By means of the enclosed questionnaire I hope to gather valuable information from regular teachers about their working relationships with "on-call" substitute teachers. Related studies have, to a large extent, neglected to seek information from a very important source, namely, those regular teachers, like yourself, that have had another person take over classes when they were unable to teach. Information gathered through this questionnaire will be used for thesis purposes in my graduate program, however, I do hope that the findings of my study will have a bearing on future changes and improvements in Alberta Substitute Teacher services.

I have received an excellent response from Alberta School Superintendents to a questionnaire concerning policies and usage statistics regarding substitute-teacher services in their system. Questionnaires have been distributed throughout Alberta to Substitute Teachers and the responses to date are most gratifying. I am soliciting your cooperation to complete the brief questionnaire attached herein. Names and addresses of regular teachers that have used substitute teachers for 3 or more days during this school year were selected at random by central office personnel of your system and forwarded to me so that questionnaires could be mailed.

If you are prepared to assist me in this project would you please follow the brief instructions which precede each part of the questionnaire. Attempt to answer all questions. Questionnaires are not identified in any way. A high percentage of return is very important for this study. A stamped, addressed return envelope is enclosed. Please try to make your mailing date on or before Monday, May 4th, 1970. Your cooperation will be appreciated. Thank you for your time and effort.

Yours sincerely,

Alex Kozeluk



APPENDIX B

QUESTIONNAIRE TO SCHOOL SYSTEMS



## QUESTIONNAIRE TO SCHOOL SYSTEMS

All information obtained through this questionnaire will be considered strictly confidential and for use by the author and his thesis advisor only. School systems will not be identified by name in the thesis. A word of explanation about any question you do not answer would be appreciated.

Name of school system \_\_\_\_\_

Position of respondent \_\_\_\_\_

1. What was the total number of regular staff employed by your school system during the 1968-69 school year? Regular staff refers to full-time teachers, principals and other in-school personnel directly involved with the instructional program. \_\_\_\_\_

2. What was the total number of substitute teachers employed by your system during the 1968-69 school year? \_\_\_\_\_

What was the total number of substitute-teacher days your system required during the 1968-69 school year? \_\_\_\_\_

3. How many "on-call" substitute teachers are listed as available for use in the schools of your system at present? \_\_\_\_\_

Number of these that are male? \_\_\_\_\_

4. The demand for substitute teachers and/or your concern about matters related to substitute teaching over the past few years can best be described by which term or phrase? Check ONE.

Increased \_\_\_\_\_

Remained about the same \_\_\_\_\_

Decreased \_\_\_\_\_

Check to indicate the adequacy of the supply of substitute teachers, in relation to demand, in your system during the present year.

Over Supply

About Enough

Short-age

Substitute teachers for elementary grades. \_\_\_\_\_

Substitute teachers for secondary grades. \_\_\_\_\_

Substitute teachers for special classes i.e. vocational areas, opportunity classes, advanced high school classes etc. \_\_\_\_\_

5. Rank the following to indicate the level at which substitute teachers have been required most frequently to least frequently during the present school year. 1 indicates most frequent and 4 indicates least frequent.

Division 1 \_\_\_\_\_

Division 2 \_\_\_\_\_

Division 3 \_\_\_\_\_

Division 4 \_\_\_\_\_



6. How are substitute teachers usually recruited for your system? Check One or More.

Newspaper advertising. \_\_\_\_\_

By word of mouth. \_\_\_\_\_

Through inquiries made by interested persons. \_\_\_\_\_

Other ways (please explain) \_\_\_\_\_

7. Please answer the following by checking a "yes" or a "no" for each question.

- (a) Does your school system provide substitute teachers with a substitute-teacher handbook or brochure outlining factors concerning substitute services? Yes \_\_\_\_ No \_\_\_\_
- (b) Are copies of newsletters and bulletins that are distributed to regular teachers sent to substitute teachers? Yes \_\_\_\_ No \_\_\_\_
- (c) Has your school system held a "special meeting" for substitute teachers at any time during the past 3 years? Yes \_\_\_\_ No \_\_\_\_
- (d) Has your school system held a joint meeting at any time during the past 3 years in which regular and substitute teachers had an opportunity to discuss mutual problems? Yes \_\_\_\_ No \_\_\_\_
- (e) Within the past 5 years, has your school system had a committee to work on problems of coordinating substitute services with regular-teacher services? Yes \_\_\_\_ No \_\_\_\_
- (f) Are prospective substitute teachers required to complete a written application before they are considered for employment? Yes \_\_\_\_ No \_\_\_\_
- (g) Must prospective substitute teachers be interviewed by central office administrative personnel before they are considered for employment? Yes \_\_\_\_ No \_\_\_\_

8. Please check a "yes" or a "no" to indicate whether your school board, committee or central office executive has adopted any rules, regulations, policies or operational procedures concerning the following: (If "yes" please indicate very briefly the nature of the practice.)

- (a) Authority for and/or propriety of calling in a substitute teacher? Yes \_\_\_\_ No \_\_\_\_

Comment: \_\_\_\_\_

- (b) Arrangements recommended when "on-call" substitutes are not available? Yes \_\_\_\_ No \_\_\_\_

Comment : \_\_\_\_\_







- (c) Prohibition of high school students, school secretaries, teacher aides and similar personnel from acting as substitutes? Yes \_\_\_\_ No \_\_\_\_
- Comment: \_\_\_\_\_
- (d) Professional qualifications (training, experience, etc.) required by substitutes for purposes other than salary determination? Yes \_\_\_\_ No \_\_\_\_
- Comment: \_\_\_\_\_
- (e) Responsibilities of the building principal for substitute-teacher services? Yes \_\_\_\_ No \_\_\_\_
- Comment: \_\_\_\_\_
- (f) Responsibilities of the regular teacher to the substitute teacher? Yes \_\_\_\_ No \_\_\_\_
- Comment: \_\_\_\_\_
- (g) Responsibilities of the substitute teacher to the regular teacher? Yes \_\_\_\_ No \_\_\_\_
- Comment: \_\_\_\_\_
- (h) Responsibilities of the substitute teacher to the students? Yes \_\_\_\_ No \_\_\_\_
- Comment: \_\_\_\_\_
- (i) Attendance of substitutes at meetings held for regular teachers at the system level? Yes \_\_\_\_ No \_\_\_\_
- Comment: \_\_\_\_\_
- (j) Attendance of substitute teachers at meetings held for regular teachers at the school level? Yes \_\_\_\_ No \_\_\_\_
- Comment: \_\_\_\_\_
- (k) Evaluation of the work of substitute teachers? Yes \_\_\_\_ No \_\_\_\_
- Comment: \_\_\_\_\_
- (l) The utilization of permanent supernumerary teachers (i.e. full-time employees for substitute teaching?) Yes \_\_\_\_ No \_\_\_\_
- Comment: \_\_\_\_\_
- (m) Salaries to be paid to substitute teachers? Yes \_\_\_\_ No \_\_\_\_
- Comment: \_\_\_\_\_
- (n) Others not covered in this questionnaire? (Please use reverse side of this questionnaire or the bottom part of the page that follows.) Yes \_\_\_\_ No \_\_\_\_



Thank you for completing this questionnaire. I would very much appreciate receiving an affirmative response to the requests below. Your co-operation will enable me to collect data from substitute teachers and regular teachers concerning substitute teachers and substitute-teacher services.

9. Are you willing to participate further in this study in the manner outlined below, if requested to do so?

- (a) Supply a list of names, addresses and preferred grade levels of substitute teachers presently employed by your school system. Such lists would include substitutes that have provided services for 3 or more days this school year. The lists would be used to select a sample of substitutes to whom short answer questionnaires would be mailed. These questionnaires would solicit information about: personal factors, professional factors, economic status, working relationships, etc..
- (b) Supply a given number of names and addresses of regular teachers that have used substitute services for 3 or more days during the current school year. Questionnaires would be mailed to regular teachers selected and would be concerned primarily with substitute services they have used, and working relationships with substitute teachers.
- Such lists would not be expected to exceed 10% of the total number of teachers employed, or 40 teachers, whichever is least. Please check ONE.

YES \_\_\_\_\_ NO \_\_\_\_\_



APPENDIX C

QUESTIONNAIRE TO SUBSTITUTE TEACHERS



## SUBSTITUTE TEACHER STUDY

## QUESTIONNAIRE TO SUBSTITUTE TEACHERS

## PART I

Indicate your answer by placing the appropriate number in the numbered blank to the right of each question and in the column headed "Answer Column." Answer all questions as accurately as you can. The "Card Punch Columns" is for use by the researcher.

<u>Personal Data</u>	<u>Answer Column</u>	<u>Card Punch Columns</u>
1. Sex:	1. _____	1
1. Male		
2. Female		
2. Marital Status:	2. _____	2
1. Single		
2. Married		
3. Widowed, Divorced, or Separated		
4. Religious Order		
3. Age as of January 31, 1970. Indicate by category number.	3. _____	3,4
1. Under 20 years		
2. 20 - 24		
3. 25 - 29		
4. 30 - 34		
5. 35 - 39		
6. 40 - 44		
7. 45 - 49		
8. 50 - 54		
9. 55 - 59		
10. 60 - 64		
11. 65 - 69		
12. 70 years or over		
4. How many children do you have, if any, that are financially dependent (wholly or partially) on their parent(s)?	4. _____	5
5. How many of your children require full-time care (i.e. babysitter) while you are substitute teaching?	5. _____	6
6. How could you best describe your activities on school days when you are not substitute teaching?	6. _____	7
1. Involved mainly in domestic duties.		
2. Involved in other part-time remunerative employment.		
3. Involved in other full-time remunerative employment.		
4. University student.		
5. Leisure-type activities.		
6. Other. Indicate _____		

Substitute Teacher Data

7. At what level do you <u>most often</u> substitute teach?	7. _____	8
1. Division 1 (grades 1 - 3)		
2. Division 2 (grades 4 - 6)		
3. Division 3 (grades 7 - 9)		
4. Division 4 (grades 10-12)		





- |  |             |          |
|--|-------------|----------|
| 8. Where is/are the school(s) in which you do most of your substitute teaching located?  | 8. _____    | 9        |
| 1. In a large city (population <u>over</u> 100,000)  |             |          |
| 2. In a small city (population <u>under</u> 100,000)   |             |          |
| 3. In a town   |             |          |
| 4. In a village or in a rural area   |             |          |
| 9. For how many different teachers have you substituted from Sept. 1, 1969 to March 31, 1970 inclusive? (i.e. if during this period you taught for Mr. X 3 days, Mrs. Y 4 days and Miss Z 5 days this would be 3 different teachers) | 9. _____    | 10,11    |
| 10. How many years (including the present school year) have you been doing substitute teacher work?  | 10. _____   | 12       |
| 11. a. For how many months have you offered your services as a substitute teacher (during the 7 month period) from Sept., 1969 to March, 1970 inclusive)?  | 11.a. _____ | 13       |
| b. How many days did you substitute teach during the period indicated above?   | b. _____    | 14,15,16 |
| 12. What is your daily rate of pay as a substitute teacher? (to the nearest whole dollar)  | 12. _____   | 17,18    |
| 13. What would your annual salary be (approximately) if you were employed as a full-time teacher at the present time? (to the nearest 100 dollars)   | 13. _____   | 19,20    |

#### Professional Background Data

- |  |           |       |
|--|-----------|-------|
| 14. What classification is your highest Alberta teaching certificate?  | 14. _____ | 21    |
| 1. Professional (includes Academic and High School Certificate)  |           |       |
| 2. Standard (including Standard E and S, Senior E and I, Junior High School)   |           |       |
| 3. Junior Elementary (includes First Class, Elementary and Intermediate)   |           |       |
| 4. Second Class.   |           |       |
| 5. Letter of Authority.  |           |       |
| 6. No certificate.   |           |       |
| 15. How many years of teacher and/or university training do you have? (i.e. training recognized for salary purposes)                                       | 15. _____ | 22    |
| 16. How many years ago did you complete your last year of training, as a full time student, in attendance at university or a teacher training institution? | 16. _____ | 23,24 |
| 17. How many years ago did you last complete a university credit course by regular attendance, summer session, evening credit etc.?                        | 17. _____ | 25,26 |



- What university degree(s) do you hold? Indicate one. 18. \_\_\_\_\_ 27
1. No degree.
  2. One bachelor's degree.
  3. Two bachelor's degrees.
  4. Master's degree.
  5. Other. Indicate \_\_\_\_\_
- How many years of teaching experience have you had as a full-time teacher? 19. \_\_\_\_\_ 28, 29
- How many years ago did you hold your last full-time position as an educator? (i.e. teacher, supervisor, superintendent etc.) 20. \_\_\_\_\_ 30, 31
- Which of the following would you consider to be your primary reason for doing substitute teaching work? Select one. 21. \_\_\_\_\_ 32
1. To keep in touch with teaching.
  2. To earn extra income to temporarily supplement usual family or personal source of income.
  3. To earn income required and essential to provide an adequate standard of living.
  4. As a matter of interest and hobby and/or pastime.
  5. Other \_\_\_\_\_
- Do you plan to return to a full-time teaching position within the next few years? 22. \_\_\_\_\_ 33
1. Yes
  2. No
  3. Uncertain
- How many times have you attended a staff meeting in the school(s) in which you have substituted this school year? 23. \_\_\_\_\_ 34
- Have you attended an A.T.A. local or sub-local meeting (as a substitute teacher) this school year. 24. \_\_\_\_\_ 35
1. Yes
  2. No
- Have you attended a teachers' convention, an institute or similar function during the present school year? 25. \_\_\_\_\_ 36
1. Yes
  2. No

PLEASE CONTINUE ON TO "PART II" OF THIS QUESTIONNAIRE ON THE TWO PAGES THAT FOLLOW.



any of the statements in this part of the questionnaire have been suggested (in other studies) as possible sources of problems in the function of the substitute teacher. The purpose of this part of the questionnaire is to determine the extent to which Alberta Substitute Teachers find these factors problematic. Many of the statements express negative factors, however, do not let this prevent you from giving a fair and accurate assessment of your experiences.

Directions: Indicate to what extent you have experienced difficulty in providing effective substitute teacher service, or experienced feelings of annoyance, due to the following circumstances. "0" indicates no difficulty or annoyance and "5" indicates a great deal of difficulty or annoyance (i.e. as you move toward "5" the degree of difficulty or annoyance indicates an increase). Please circle one number for each statement.

<u>Regular Teacher Factors</u>	<u>Difficulty</u>					
	None				Great	
6. Lack of adequate lesson plans left by regular teacher.	0	1	2	3	4	5
7. Failure of regular teacher to prepare students to work with or cooperate with a substitute teacher.	0	1	2	3	4	5
8. Attitude of regular teachers that substitute teachers are merely baby sitters, policemen etc.	0	1	2	3	4	5
9. Lack of contact with regular teachers - no meetings, discussion sessions, phone conversations etc.	0	1	2	3	4	5
10. Lack of personal information about pupils - seating charts, personal characteristics (i.e. handicaps etc.)	0	1	2	3	4	5
11. Regular teachers expect substitutes to forgo prep periods, spares etc. that the replaced teacher would enjoy.	0	1	2	3	4	5
<u>Administrative Factors</u>						
12. Shortness of notice prior to being called to substitute teach.	0	1	2	3	4	5
13. Failure to be oriented about special rules, routines, and schedules in particular schools.	0	1	2	3	4	5
14. Failure to acquaint substitutes with location and availability of supplies and materials; no keys to closets, cupboards, room doors etc.	0	1	2	3	4	5
15. Assignments made to grades and/or subject matter areas outside of your training and experience background.	0	1	2	3	4	5
16. Too little help from central office, supervisors, and those in charge of substitute teachers.	0	1	2	3	4	5
17. Lack of help from principals, assistant principals, department heads and other in-school administrators.	0	1	2	3	4	5
18. Failure to inform substitutes of extra duties - buses, playground supervision, lunchroom supervision etc.	0	1	2	3	4	5





	None	<u>Difficulty</u>				Great
9. Uncertainty regarding the return of the regular teacher.	0	1	2	3	4	5
0. Inefficient methods of assigning substitute teachers - selection is often made on the basis of politics, personal friendship etc.	0	1	2	3	4	5
1. Failure of full-time school personnel to give recognition and/or express appreciation for substitute teacher services rendered.	0	1	2	3	4	5

#### Classroom Factors

2. Student behavior - disciplinary problems, lackadaisical attitudes . . .	0	1	2	3	4	5
3. Lack of information on courses of study for various grades and/or subjects.	0	1	2	3	4	5
4. Lack of supplies and materials that might be of special assistance to a substitute teacher.	0	1	2	3	4	5

#### Professional, Welfare and Other Factors

5. General lack of concern by regular teachers for substitute teacher problems and substitute teacher services.	0	1	2	3	4	5
6. General unconcern of substitute teachers for their own welfare and professional growth.	0	1	2	3	4	5
7. Low pay.	0	1	2	3	4	5
8. Lack of welfare provisions - sick leave, tenure, pension, holiday pay etc.	0	1	2	3	4	5
9. General lack of concern of the teaching profession at large concerning substitute teaching services.	0	1	2	3	4	5
0. Persons uncertified and/or without teacher training performing as substitute teachers.	0	1	2	3	4	5

Thank you for answering the above questionnaire. Briefly indicate any other factors that have assisted or hindered you (to a considerable degree) in your function as a substitute teacher. Also indicate any factors you might consider to be unfair to substitute teachers in general. Your comments will be appreciated. Use the bottom of this page and the reverse side if required.





APPENDIX D

QUESTIONNAIRE TO REGULAR CLASSROOM TEACHERS



## SUBSTITUTE TEACHER STUDY

## QUESTIONNAIRE TO REGULAR CLASSROOM TEACHERS

## PART I

Indicate your answer by placing the appropriate number in the numbered blank to the right of each question and in the column headed "Answer Column." Answer all questions as accurately as you can. The "Card Punch Columns" is for use by the researcher.

<u>Personal Data</u>	<u>Answer Column</u>	<u>Card Punch Columns</u>
1. Sex:	1. _____	1
1. Male		
2. Female		
2. Marital Status:	2. _____	2
1. Single		
2. Married		
3. Widowed, Divorced, or Separated		
4. Religious Order		
3. Age as of January 31, 1970. Indicate by category number.	3. _____	3,4
1. Under 20 years		
2. 20 - 24		
3. 25 - 29		
4. 30 - 34		
5. 35 - 39		
6. 40 - 44		
7. 45 - 49		
8. 50 - 54		
9. 55 - 59		
10. 60 - 64		
11. 65 - 69		
12. 70 years or over		
<u>Professional Data</u>		
4. At what level do you do most of your classroom teaching?	4. _____	5
1. Division 1 (grades 1 - 3)		
2. Division 2 (grades 4 - 6)		
3. Division 3 (grades 7 - 9)		
4. Division 4 (grades 10-12)		
5. Where is the school in which you teach located?	5. _____	6
1. In a large city (population <u>over</u> 100,000)		
2. In a small city (population <u>under</u> 100,000)		
3. In a town.		
4. In a village or in a rural area.		
6. How many different substitute teachers have taught your classes between Sept. 1, 1969 and March 31, 1970? (Substitute herein is a person called in for a day or more from outside of your school)	6. _____	7,8
7. How many days have you had a substitute teacher (as described in question 6) take over your classes between Sept. 1, 1969 and Mar. 31, 1970?	7. _____	9,10



- |  |           |        |
|--|-----------|--------|
| 8. How many years (including the present school year) of teaching experience do you have?  | 8. _____  | 11, 12 |
| 9. How many complete years of teacher and/or university training do you have? (i.e. training for salary purposes)  | 9. _____  | 13     |
| 10. Given a choice, which <u>one</u> of the following possible arrangements for providing substitute teacher services for your classes (or school) would you prefer? | 10. _____ | 14     |
1. Regular teachers can cover by combining classes wherever possible (where size of class permits).
  2. Additional preparations periods which must be used for substitute purposes if a fellow teacher is absent for a few days.
  3. Having a corps of full-time teachers who can be called by central office and who do full-time substitute teaching.
  4. Using "on-call" substitute teachers on a day-to-day basis as is commonly done at present.
  5. Other (indicate) \_\_\_\_\_

## PART II

The purpose of PART II of this questionnaire is to determine the extent to which regular teachers find certain aspects of the substitute-teacher function problematic. Many of the statements in this part of the questionnaire express negative factors about substitute teachers and/or their services, however, do not let this prevent you from giving a fair and accurate assessment of your experiences with "on-call" substitutes. Your comments at the end of the questionnaire would be appreciated.

Directions: Indicate to what extent you have experienced dissatisfaction or annoyance due to the following circumstances. "0" indicates no dissatisfaction or annoyance and "5" indicates a great deal of dissatisfaction or annoyance (i.e. as you move toward "5" the degree of dissatisfaction or annoyance indicates an increase). Your answer should indicate the "general" or "most common" situation you have experienced. Please circle one number for each statement.

	<u>Dissatisfaction</u>					
	None				Great	
11. Failure of the substitute teacher to follow lesson plans prepared for him/her.	0	1	2	3	4	5
12. Substitute teachers seem to perform mainly as baby sitters, policemen etc.	0	1	2	3	4	5
13. Lack of contact between the regular teacher and the substitute teacher; no meetings, discussion groups, phone conversations etc. before and/or after substitution.	0	1	2	3	4	5
14. Failure of substitute teachers to associate with regular teachers (i.e. in the staffroom etc.).	0	1	2	3	4	5
15. Failure of substitutes to leave an outline or other indication of work completed.	0	1	2	3	4	5
16. Substitute teachers disorganize materials, facilities etc.	0	1	2	3	4	5
17. Discipline problems seem to increase following the services of a substitute teacher.	0	1	2	3	4	5



		<u>Dissatisfaction</u>					
		None			Great		
18.	Confidential information about students is divulged by substitute teachers to those not entitled to such information.	0	1	2	3	4	5
19.	Professional ethics (conduct) of substitutes is lacking i.e. complaining regarding performance of regular teacher prior to any consultation with the regular classroom teacher.	0	1	2	3	4	5
20.	Substitute teachers provide bad "public relations" or "public image" of the teaching profession.	0	1	2	3	4	5
21.	Inadequate supply of "good" substitute teachers that can adequately teach my classes when I am absent.	0	1	2	3	4	5

Thank you for answering the above questionnaire. In the space provided below, suggest any ways you believe substitute teacher services could be improved for your classes, your school or school system. Your comments (positive or negative) concerning substitute teaching services will be appreciated.





APPENDIX E

BASES AND AMOUNTS OF PAYMENT TO SUBSTITUTE TEACHERS



Reprint from "Analyses of 60 County & Division & 65 District Agreements for 1968-69." Mimeographed material. The ATA.

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#### 4- SUBSTITUTE TEACHERS

44 out of 60 agreements specify payment of substitute teachers.  
(School Divisions and Counties)

In three agreements the remuneration depends on grades taught:

\$20 elementary and junior high school  
\$24 senior high school

In four agreements salary depends on amount of teacher training:

1 - \$16-24 per day  
1 - 18-20 per day  
1 - 18-30 per day  
1 - 20-25 per day

4 agreements stipulate payment at 1 year teacher education basic minimum

9 agreements stipulate payment at 1/200 minimum depending on years of training

7 agreements stipulate payment at 1/200 of regular salary

1	"	"	"	at \$15 per day
1	"	"	"	at 16 per day
3	"	"	"	at 18 " "
1	"	"	"	at 18.50 per day
1	"	"	"	at 19.50 per day
11	"	"	"	at 20 per day
1	"	"	"	at 25 per day

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#### 4- SUBSTITUTE TEACHERS

46 out of 65 district agreements specify salaries for substitutes.

1 stipulates \$17 (elem), \$19 (J&SHS) + \$4 per day with degree

1 " 18.50 (elem), \$20 (J&SHS) + \$2 per day with degree

2 " 19 per day undergrads, \$24 per day graduates

1 " 18 " " " \$20 " " "

1 " 20 " " " \$22 " " "

3 " 18 - 20, \$24 or \$26 depending on years of training

2 " 1/250 basic minimum of 2 years training + \$4 with degree

13 " 1/200 basic minimum

7 " 1/200 regular salary

1 " \$12 per day

1 " 16 " "

2 " 18 " "

1 " 19 " "

9 " 20 " "

1 " 25 " "





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